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## Sample Letter to Family and Friends

Upon acceptance into the trust, the sub-trust account is available to receive funds from any third party source. You may use this Sample Letter to share information about this trust account with family and friends who may wish to include your loved one in an estate plan or to make a gift to the trust for their benefit.

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Dear [Name of Family Member or Friend],

We have established a special needs trust for [Name of Trust Beneficiary] with NYSARC Trust Services so that we can provide for [Name of Trust Beneficiary]'s future needs while preserving [his/her] financial eligibility for means-tested government benefit programs, including Supplemental Security Income (SSI) and Medicaid.

To qualify for these programs, which provide assistance with food, housing, medical benefits, and other vital services, a person can only have a limited amount of money in their name. The NYSARC Third Party Community Trust is set up to receive funds for the benefit of [Name of Beneficiary] and the funds in the trust are not counted as income or assets when determining [his/her] financial eligibility for these services.

If [Name of Beneficiary] receives any money or assets directly through a gift or inheritance, it could put these benefits at risk, causing a reduction or complete loss of services. Re-instating these services could be a real challenge to [Name of Beneficiary] and result in unnecessary expenses, so it is our goal by creating this trust account to help avoid that altogether.

If you wish to include [Name of Beneficiary] in your estate plan, even just as a contingent beneficiary in a will or IRA designation, please use the suggested language below to make a bequest or gift to the *NYSARC Third Party Community Trust for the Benefit of [Name of Beneficiary]*.

### **Suggested Language:**

"NYSARC, Inc., or its successors or assigns, as Trustees of the *NYSARC Third Party Community Trust*, as amended, *for the benefit of [Full Name of Beneficiary]*."

If you have questions or you wish to make a deposit to the trust, contact NYSARC Trust Services at (518) 439-8283.