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Administering the California Special Needs Trust: A Guide for Assisting a Person with a Disability as Trustee of a Special Needs Trust

Kevin Urbatsch

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In Administering the California Special Needs Trust, author Kevin Urbatsch presents a guide for anyone assigned the duty of managing a Special Needs Trust for a person with a disability. Though geared toward those who never have administered a trust, it also provides sophisticated answers for experienced trustees concerning some of the unique responsibilities a trustee of a special needs trust will encounter. Urbatsch, a California attorney who has years of experience in assisting trustees to manage special needs trusts, has written extensively for both attorneys and families on how best to establish a special needs trust. Administering the Special Needs Trust addresses specific California issues that a special needs trust trustee encounters daily. In a question-and-answer format, it addresses how to avoid the most common mistakes made by SNT trustees; understand the type of public benefits available for California persons with disabilities; learn how SNT disbursements will affect these public benefits; best pay for a person with a disability's housing, caregiver costs, transportation, and related expenses; handle SNT investments, accountings, and taxes; terminate the SNT. With checklists, form documents, and law summaries included, Administering the Special Needs Trust contains a wide range of information for those charged with the responsibility of managing a special needs trust for people with disabilities.

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