

Sample letter to relatives about the establishment of a special needs trust

Dear:

Since you are a special person to [child], we wanted you to know how we are making plans for [child]'s future.

A supplemental special needs trust has been established for [child.] This trust allows [child] to remain eligible for government programs available to him/her, but provides money to supplement [child]'s lifestyle and care. The supplemental money can be used for things such as:

- Health and dental treatment and equipment for which there are not funds otherwise available
- Rehabilitative and occupational therapy services
- Medical procedures, even though not medically necessary or lifesaving
- Medical insurance premiums
- Supplemental nursing care
- Supplemental dietary needs
- Eyeglasses
- Travel
- Entertainment
- Companionship
- Private case management
- Cultural experiences
- Expenses associated with bringing relatives or friends to visit with the beneficiary
- Vacations
- Movies
- Telephone service
- Television and cable equipment and services, radios, stereos
- Training and education programs
- Reading and educational materials

When money or property is given directly to [child], even as an inheritance, it may affect his/her ability to receive the government programs. Therefore, we wanted you to know about the trust. Any person can make donations to the trust, either through direct contributions or through a will. Donors who make substantial contributions may even be able to leave instructions for distribution of any remaining amount of their contribution upon the death of [child.]

If you would like more information about this trust, please contact _____.

Thank you for helping us provide the best future we can for [child.]

Sincerely,