



O'Donnell, Weiss & Mattei, P.C.



OWM Law Newsletter January 2019

•FEATURE ARTICLE: *What is a Special Needs Trust?*

•OWM FIRM NEWS & UPCOMING EVENTS

•PCTV – Current Episodes:

– What is a First-Party Special Needs Trust? (January 2019 #1)

– What is a Third-Party Special Needs Trust?(January 2019 #2)

Watch the Current and Previous Episodes of Legal Talk



Rebecca A. Hobbs,
Esq., CELA

What is a Special Needs Trust?

Special needs trusts (also known as "supplemental needs" trusts) are an important component of planning for an individual with a disability. A special needs trust allows a disabled beneficiary to receive inheritances, gifts, lawsuit settlements, or other funds and yet not lose his or her eligibility for certain government programs, such as Medicaid or Supplemental Security Income (SSI). Special needs trusts are drafted so that the funds will not be considered to belong to the beneficiary in determining his or her eligibility for public benefits.

Distributions from a special needs trusts cannot provide basic support. Instead distributions from a special needs trust are to pay for supplemental items. Examples of items that a special needs trust may pay for include education, entertainment, vacation, hobbies, and medical care beyond the simple necessities of life.

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Firm News & Upcoming Events

[Rebecca A. Hobbs, Esq., CELA](#), has been named [ElderLawAnswers'](#) first National Director. In this role, Hobbs will create new programming, including a new podcast series and a members-only forum, that will add even greater value to an ElderLawAnswers membership. See more [here](#).

[Rebecca A. Hobbs, Esq., CELA](#), speaking at Exton Senior Living, 600 Pottstown Pike, Exton, PA on 1/24/19 from 5:30 p.m.-7:00 p.m. regarding common questions on Elder Law (for more information contact Amber Page, Director of Sales and Marketing at 610-594-0200).

[Rebecca A. Hobbs, Esq., CELA](#), speaking at Chester County Night School Seminars at Owen J. Roberts Middle School, Pottstown, PA on 3/19/19 from 7:00 p.m.- 8:00 p.m. entitled "*Elder Law: How to Protect Your Assets and Plan for the Cost of Long Term Care*" (learn how to protect your assets from the costs of long-term care; get common questions answered, such as "should i transfer our home to the children" or "do I need a trust?") and on 4/9/19 from 7:00 p.m.-8:00 p.m. entitled "Estate Administration: Probate 101" (estate administration and the probate process in Pennsylvania). (click [here](#) for more information or contact Chester County Night School at 610-692-1964 or online at www.chestercountynightschool.org).

[David A. Megay, Esq.](#), speaking at Chester County Night School Seminars at Owen J. Roberts Middle School, Pottstown, PA on 3/25/19 from 6:30 p.m.- 8:30 p.m. entitled "*Ask the Lawyer: Starting and Operating Your Own Business*" (the pros and cons of, and legal issues in, starting and operating your own business, as well as the different types of legal entities and other legal details regarding owning and operating your own business) and on 1/29/19 and 4/29/19 from 6:30 p.m.-8:30 p.m. entitled "*Ask the Lawyer: Buying and Selling Real Estate in Pennsylvania*" (legal issues regarding buying and selling real estate, both with and without the involvement of a real estate agent, including common issues and pitfalls) (click [here](#) for more information or contact Chester County Night School at 610-692-1964 or online at www.chestercountynightschool.org).

[Thomas "Tip" McCabe, Esq.](#), speaking at Chester County Night School Seminars at Owen J. Roberts Middle School, Pottstown, PA on 4/9/19 from 6:30 p.m.- 8:00 p.m. entitled "*Crime & Punishment in Pennsylvania*" (an overview of the modern criminal justice system in Pennsylvania from traffic stops to jury trials) (click [here](#) for more information or contact Chester County Night School at 610-692-1964 or online at www.chestercountynightschool.org).



Watch OWM's Legal Talk on PCTV, Tuesdays at 8:30 Channel 28, and Thursdays at 9:30 p.m. Channel 98, or on our website [here](#).

Read Legal Ease every first and third Sunday in the [Pottstown Mercury](#).



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