

Types of Special Needs Trusts

- Supplemental Needs Trust – Third-Party Funded
Proactive Tool.
 - A trust created by a third party with the third party's assets which are intended to be used for the beneficiary and will not be considered available for SSI/Medicaid purposes.
- Payback Trust, Self Settled, 1st Party, Special Needs
Reactive Tool
 - A trust created by a Medicaid/SSI recipient using their own assets. The assets in the trust are not considered available for SSI/Medicaid purposes.
 - Private - (d)(4)(A) – Stand Alone
 - Pooled - (d)(4)(C)