

SPECIAL NEEDS TRUST ADMINISTRATION

FACTORS TO CONSIDER IN TRUSTEE SELECTION

- Knowledge and Relationship with person with disability
- Costs
- Level of service
 - Case management
 - Legal expenses to defend the trust
 - Amendments to comply with changes in federal requirements
 - Will trustee hold non-cash assets in the SNT?
- Knowledge of public benefit programs, community resource, distribution rules and impact on benefits, reporting requirements.