

SNT TRUSTEE'S BASIC DUTIES

- Consistent with purpose of trust to supplement public benefits & enhance the beneficiary's quality of life
- Prudently invest and protect trust assets
- Authorize distributions while making funds last as long as practicable
- Work with the beneficiary's guardian or conservator, if one has been appointed
- Stay current with applicable SSI and Medicaid income and resource rules so trust assets and distributions do not adversely affect beneficiary eligibility
- Keep accurate records, reply to eligibility requests and file necessary federal and state tax returns
- Report regularly to beneficiary and other interested parties
- Defend the trust if necessary at a reasonable cost
- Terminate the trust and distribute assets consistent with the terms of the trust and applicable federal and state laws and regulations