

Bob's Story: SoonerCare needed

Bob's assets exceed \$2000, so you conclude that Bob would benefit from a Special Needs Trust so that he can qualify for SoonerCare immediately.

Question: Is Bob's physical and mental condition severe enough to establish a SNT:

Answer: Yes. Bob is unable to engage in any substantial gainful activity by reason of a mental or physical impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.

Question: What is the maximum age for establishing a SNT?

Answer: up to age 65

Question: Who should establish the SNT on Howard's behalf?

Answer: Bob's mother, father, grandparents OR Bob's guardian OR a court Or Bob