

Special Needs Planning

If you have a loved one with Special Needs, and if that person either qualifies for or is eligible for public needs-based benefits, leaving assets outright to that person can cause them to lose their benefits.

Public needs-based benefits such as SSI, Medicaid, and various Medicaid Waiver Programs and community supports often have strict income and asset restrictions. Therefore, if you are leaving assets to an individual with disabilities, it is absolutely necessary to set up a Special Needs Trust. Even if your loved one is not on public needs-based benefits, people with special needs or disabilities often require different types of asset protection and may need assistance with managing and investing their funds. At McMillan Metro Faerber, we are available for Special Needs Planning. Please call and make an appointment for a Special Needs Consult.

Please call us at **(301) 251-1180** or [submit an online inquiry](#).

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