

Personal Injury Settlement Consulting

Does My Client Need a Special Needs Trust?

1. Is the plaintiff a “disabled” person? Yes No
2. Has the person received a disability determination by the Social Security Administration (SSA)? Yes No
3. Has the person or could the person apply for a Determination of Disability by the SSA? Yes No
4. Is the disabled person receiving or likely to receive any of the following means-tested public benefits?
 - SSI
 - Medicaid
 - Medicaid Waiver
 - NJ Family Care/PA CHIP
 - Section 8 Housing
 - SNAP (Food Stamps)
 - Group Home
 - Other _____

If the answers to all of the questions above are YES, a Special Needs Trust should be considered.

If any of the items on the above list have not been addressed, the client has not been adequately protected and a potential malpractice suit may be looming.