WNY Coalition Pooled Trusts

PUT YOUR TRUST IN US

What is a Pooled Trust?

A Pooled Trust is a tool that can be used to enhance the quality of life for individuals with disabling conditions. The trust can be used to purchase additional items and services not adequately covered by governmental benefits. The Pooled Trust must be used for the benefit of a person with a disabling condition and the expenditures made on behalf of that person should supplement, not replace their government benefits.

Eligibility Requirements

To participate in a pooled trust, a person must have a qualifying disability as defined by Social Security. Those who receive SSDI or SSI benefits may generally already qualify to use a pooled trust.

Contact us if you or your client

- Has a Medicaid Spenddown
- Has/Will be receiving a personal injury settlement
- Has/Will be receiving an inheritance
- Has/Will be receiving a back payment from the Social Security Administration
- Has trouble staying below the SSI resource level

What is a spenddown?

Medicaid's Monthly income limit is $1,836

Example: Client's monthly income is $2,436

$2,436
-$1,836
$600 spenddown

What can the spenddown money be used for?

- Rent/Mortgage
- Utilities (Gas, Electric, Water)
- Furniture
- Groceries for beneficiary
- Healthcare Supplies/OTC items
- Cable/Internet/Phone
- Transportation/Vehicle expenses (owned by beneficiary)
- Travel Expenses

Advantages of a Pooled SNT

- Available to individuals of all ages, receiving certain benefits
- Easily and quickly established
- Professionally administered in WNY
- Can be established now or in the future via will

For more information please visit www.wnypooledtrust.org or call 1-866-362-5081

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