

Third Party Special Needs Trust Checklist

Do I need a Third Party Special Needs Trust for my child?

1. Is my child a “disabled” person? Yes No
2. Has my child received or could my child receive a disability determination by the Social Security Administration (SSA)? Yes No
3. Has my child applied for or could my child apply for a determination of disability by the SSA? Yes No
4. Is the my child receiving or could my child receive any of the following means-tested public benefits?
 - SSI
 - Medicaid
 - Medicaid Waiver
 - NJ Family Care
 - Section 8 Housing
 - Food Stamps
 - DDD
 - Group Home
 - Psychiatric Institutionalization
 - Other _____
5. Do I have a plan for my child with disabilities after I am gone? Yes No

If the answer to any of the above questions is YES, you are in need of a Third Party Special Needs Trust.