

The need for lifetime assistance is a number one concern for many families.

The Special Needs Trust Assessment is one of the many services offered through Ascentia's Family Advocacy & Support Services. We also offer:

- Lifetime Planning Consultation
- Pooled Disability Trust Liaison
- Representative Payee and Bill Paying Services
- Non-clinical Case Management
- Advocacy
- Information and Referral
- Education

Let Ascentia help you and your family with this kind of support. Call 216.378.3564 for more information.

Ascentia
Pathways to Community Living

The Drost Family Center
24075 Commerce Park Dr.
Beachwood, OH 44122
216.292.3999
www.ascentia.org

The Pooled Disability Trust program is a partnership between Community Fund Management Foundation, the Jewish Community Federation and Jewish Family Service Association. US Bank is the trustee of all accounts established.

Ascentia: Pathways to Community Living is a program of JFSA | 

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Special Needs Trust Assessment

We'll help you determine the best options for you and your loved one.



Ascentia
Pathways to Community Living

Ascentia understands that families want to prepare for a time when they cannot care for a loved one.

Pooled Disability Trust Advantages

- Provides for your disabled loved one today and when you are no longer available to do so
- Provides peace of mind that your loved one will be taken care of
- JFSA staff can act as a designated advocate
- Safeguards your loved one's eligibility for government benefits
- Enables a benefactor to fund the trust at any time
- Funds can be used for expenses not provided for under government programs
- Affordable administrative fees

Trusts Available to Maintain Eligibility for Entitlements and Benefits.

Master Trust

- Can be made revocable or irrevocable
- Can only be funded with monies from others (not the disabled)
- \$15,000 minimum needed to establish the fund.
- After the death of the beneficiary, any balance in the trust can be gifted to another beneficiary.

Pooled Medicaid Payback Trust

- Can be funded by any individual at any time
- \$5,000 is needed to establish a fund and access monies
- Irrevocable trust
- Upon beneficiary's death, balance in the trust is designated to the Jewish Community Federation of Cleveland to provide financial support for those who lack the means to have their own trust



Roll-In Payback Trust

- Designed for adults with a disability who are able to contribute small amounts of money on regular or irregular basis
- \$750 minimum required to establish fund
- \$5,000 balance required to access monies for supplemental items or services
- Irrevocable trust

For more information, please contact Ascentia's Family Advocacy & Support Services at 216.378.3564

