Why They Care About the Threshold

We asked a few of our Threshold Board Members, Donors, Volunteers and Community Partners "WHY" they do what they do for our organization. We feel blessed that so many people understand and want to help our mission and the people we serve. Sharing their "Why" with the community is a way we can honor their caring spirit. We hope you enjoy reading their stories! THANK YOU to all of these wonderful people and ALL of our stakeholders, whom we consider our friends!

WEST BEND COMMUNITY LIBRARY



Our wonderful, local library is a great resource to clients in many of our programs. Their offerings open doors and open minds for exploration and learning. In addition, staff at the West Bend Community Library are phenomenal in helping clients find information on

their interests. We are fortunate to have this great resource in our community who believes in giving back! Nancy Larson, Outreach Librarian, shared her thoughts: "I cannot say enough about how wonderful this relationship has been for me personally.

The library has enjoyed over twenty years of partnering with Threshold Inc. Because continuous learning is obviously a priority at Threshold Inc., a large part of the library's role is to provide the resources to foster a lifelong learning model. Each month the library's Outreach Program exchanges bins of library materials to enhance



learning at three Threshold programs. Our relationship is further fostered by visiting each other - like old friends. The Threshold's community program group has been visiting the library for many years. Visits to the library have involved watching movies, working with IPads, and craft projects. One of the most rewarding projects has been visits by the library's Outreach Program to Threshold Senior Day Service to work with IPads to promote adult literacy. The mutual respect, appreciation and pure fun will ensure that this community partnership will last long into the future."

BLUE LOTUS FARM & RETREAT CENTER



As one of the great and valued Community Partners and friends of the Threshold, Blue Lotus is an extremely popular destination for clients of ALL ages! Oh, did we mention our staff love going there too? THANK YOU to Jackie Janz.

executive director and ALL of the wonderful staff at Blue Lotus for providing a safe and enjoyable place for clients of the Threshold to visit!

Jackie's thoughts: "Each year at Blue Lotus Farm & Retreat Center, we are grateful to see our friends from the Threshold visit us. For more than a decade, we have shared much joy and laughter with the wonderful Threshold staff and clients. We have enjoyed seeing everyone having fun

while participating in outdoor activities like boating, swimming, swinging, and taking walks along with playing musical instruments and yard games. Seeing everyone's faces light up while having fun in the beautiful outdoors inspires us to keep working hard so our friends at Threshold have an accessible and fantastic day in nature."



VOLUNTEERS



Rick Du De Voire

Rick absolutely LOVES to volunteer at various organizations throughout our county! In summer of 2021, Rick helped us out tremendously by offering his services in helping to clean up our

overgrown landscape at Rolfs Avenue. When asked "WHY" he volunteers, Rick had this to say; "I have had good experiences and bad experiences in life. Having been involved in two car accidents and being allowed to live, I wanted to help others. For 30 years I was unable to work in my career, so I offered my services by counseling those I knew who were in trouble. I also believed in volunteerism, so I continue to do this as long as my health allows." Thank you Rick! You are an inspiration to others!



Mike Wolf

For three and a half years, Mike, who lives in Richfield, has been coming to our Dennis Stockhausen Senior Day Center every month to play the accordion for clients and they LOVE IT! Mike is big brother to

one of our valued staff members - Mary Ellen Duehr. We asked Mike "WHY" he volunteers. "I enjoy volunteering and connecting with clients. Although I know they enjoy my music, I get a lot out of doing this. I think all of us who volunteer feel the same way! Seeing the clients' reactions and watching them dance as I play is a blessing to me. I know what songs they like and I know them by name. It brings me great joy! Through the years, I have played at other Health Care Centers and Nursing Homes, which is always a very rewarding experience - making days special for special people." Mike has been playing the accordion since he was 7 years old and now, his granddaughter who is 6 years old wants to play the accordion, just like grandpa! Thank you for spreading your talent to others Mike!

WIN \$5000, \$500 or \$100!

LOOK INSIDE TO ENTER OUR **FREE** SWEEPSTAKES!

If you or someone you know is in need of our services, go to our website to learn more - www.thresholdinc.org or give us a call today. We are here to promote growth in people with cognitive and physical disabilities, traumatic brain injuries and developmental delays.



2021

REPORT TO THE COMMUNITY

Serving the local community for over 58 years by Creating Opportunities to Enrich Lives

GREETINGS

From our board president and executive director

HELLO FRIENDS AND NEIGHBORS!

Last Year when we wrote this message, we said we would not be discussing 2020, but wanted to focus on the future. This year we are writing about the 2021-year and our future as an agency. It is obvious to state the past two years have been a challenge most of us have never seen before and hope we never do again! We hear people talk about the "new normal" and how we should just live with it. We cannot live with it. Most of us have had family members who were sick and people we know who have passed away. If this is the new normal, we all need to do our best to change it.

In regards to our services, it has been a roller coaster ride. We can go weeks where staff and clients are healthy. Then, at the drop of a hat, we are sending people home or shutting down services. Our staff have been phenomenal during these trying times! We are in awe of how they have stepped up to take on their tasks and have so willingly adjusted to necessary changes. They have also come up with some very creative ways to provide services and better utilize our facilities. Our staff is truly the backbone of our success!

Another huge reason we have been successful is due to our friends, donors, business customers, foundations, board members and volunteers. Without their caring support, we would not have been able to tread water these past few years and accomplish all that we have. On behalf of everyone associated with the Threshold, THANK YOU!

Every day, we all hear how employers are facing challenges in finding employees. The Threshold is no different from any other business in that respect. If you are looking for a great place to work, consider working for the Threshold! We offer great benefits and most of our staff have been with us for many years! Just give us a call or check our website for current openings so you may join our team.

As part of our strategic plan for 2021, we have consolidated some of our services and have moved our LINK day service program from the LVS Center to Rolfs Avenue. This gives us more program space, allows us to establish a better staffing schedule, helps us to continue providing quality services and be more flexible in our programming. Discussions are already underway for our 2022 strategic plan initiative on how we can update and enhance our program spaces at both locations in an effort to meet the needs of those we serve, now and in the future.

In 2021, we saw an increase in the number of people receiving services with us in our Birth to 3, Achieve Employment, Adult Day Services and a few other programs. We continued to provide services to business customers through our TTI Industries and Clean Sweep departments, and we thank them for doing business with us.

We look forward to another great year at the Threshold, we will continue to look toward the future and we will modify our services as needed. In closing, we want to say thank you for all of the support our stakeholders have given to the Threshold over the years. It has been tremendous!

After a successful career as Executive Director of the Threshold, John Bloor will be retiring the first week of August 2022. The Search Committee is working diligently to find an exceptional replacement. Next year at this time, someone else will be writing this message. On behalf of the staff, board and clients of the Threshold, we appreciate all that John has done for our organization for the past 10 years and wish him well in retirement! You will be missed John!





Phil Sutter
President,

Board of Directors



John Bloor
Executive Director

STEWARDSHIP The Threshold is guided by principles of integrity, transparency and quality. We conduct all of our activities in a fiscally responsible manner, providing programs and services that advance our mission. We treat our clients, staff and volunteers with dignity and respect, building a community of caring, responsible citizens.

BIRTH TO 3

In 2021, 352 families with children who have developmental delays or disabilities under the age of three received support through the Birth to 3 Program. This is an increase of 22 families from the 2020 year. The number of home visits we conducted over the course of the year was an astounding 5,754! Services include early childhood education, speech, occupational or physical therapy and service coordination. The Threshold is the Birth to 3 provider for Washington County.

For more information on our Birth to 3 Program, please call 262-338-4430, extension 559.





United Way of Washington County Threshold's Birth to 3 Program receives significant funding through donations to the United Way of Washington County.

Thank You for supporting United Way!

MEET THE McCUTCHEON FAMILY

Josh and Samantha (parents) and daughters Lyliann-16, Emilia-4, and MaKena-2. Their story epitomizes the importance of our Birth to 3 program and how staff work with families and their children with education and support tools to help them in their child's iourney to reach their fullest potential.



"Our journey with MaKena started back in November 2019, three months before she was born. What was supposed to be a simple anatomy scan turned into several visits backand-forth to the Fetal Concerns Department at Children's Hospital. The scan showed issues with the ventricles in her brain as well as deformities within her heart.

We began preparing for the worst as we were praying for the best. This included end-of-life plans, organ donation and explaining the situation to Makena's' two older sisters. What was supposed to be a joyous time in our life had turned into a world of fear and tons of unknowns.

MaKena came into this world on February 20, 2020 at Children's Hospital. She spent two weeks in the NICU before coming home on March 4. We were prepared for MaKena to be born needing heart surgery due to a large ventricle septal defect (a hole in her heart). She had other thoughts however and it closed up on its own,

removing the need for surgery. She was diagnosed with Unilateral Cerebellar Hypoplasia. CH puts MaKena at risk for a delay in gross motor skills, struggles with coordination and balance, and poor muscle tone. She was referred to the Birth to 3 program to continue with the services post her hospital stay.

Within a few days after leaving the hospital, the pandemic hit and everything was delayed. We continued to do the exercises with her daily and we are fortunate to get in-home physical therapy started in June 2020.

We cannot even come close to expressing how amazing the Birth to 3 team has been since they began working with MaKena. Her team includes a physical, occupational and speech therapist as well as her service coordinator. MaKena is a very strong willed young lady and is determined to do it all. Although she continues to have a long road ahead of her, we sit here today a mere month before she turns two and she is doing amazing. The personal above and beyond effort and support to help her learn, grow and be as independent as she can has been truly a game changer for our family. MaKena's therapists have not only helped her in ways we never dreamed possible but also extended their goodwill to her two older sisters by helping them to interact with her.

Watching MaKena instantly smile when one of her therapists walks in the door warms our hearts.

What once was a fear that our daughter may not breathe on her own, ever walk, talk, or understand the things going on around her, has now become a daily celebration of her accomplishments, and her "never give up" mentality. MaKena has brought our family so much joy and love. We are very fortunate to have the Threshold's Birth to 3 program join us on this journey.

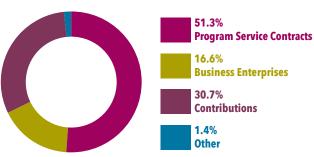
Thank you again for all that you have done and continue to do for our family as well as the other families across Washington County."

Josh and Samantha McCutcheon

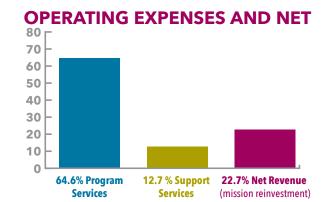
ANNUAL REPORT EDITOR: Laura Eggert, Director of PR/Fund Development

Stakeholder Satisfaction Survey Results 92% 90% Client Discharges are Positive Previous Year





*Detailed financial audits available upon request.



Update and enhance our program spaces at both of our locations in an effort to meet the needs of those we serve, now and in the future.

CHAD UEBERSETZIG - Board Vice President



1. Why do you volunteer in your community?

I was born and raised in West Bend. When I finished school, I returned to West Bend where I settled in with my wife, Jennifer, to raise our family here. I always enjoyed

being involved within the West Bend Community. Volunteering is not only a great way to give back but also a way to become more connected with others and to help positively influence the place where we live. As our children became a little older, I was looking to expand outside of their school activities and I was fortunate enough to have an opportunity to serve on the Threshold Board.

2. What are your reasons for volunteering with the Threshold?

The Threshold has been such a long standing and positive organization in West Bend for many years. Being a board member has provided me the chance to interact with the organization and its members - all of which have been very positive. The Threshold team and other board members have a true interest in continuing to ensure that they service their clients and the community. This combination makes it easy to want to get and stay involved with the Threshold.

3. How do you believe your volunteer service to the Threshold helps the organization fulfill its mission?

My background and experiences in organizational leadership, coupled with the interest in continued success of the Threshold has paired well. As a team, we have weathered through some difficult times - COVID pandemic being the most notable situation that continues to drive this team to adapt and remain focused to the mission set forth by the Threshold. As a board member, I have the opportunity to positively influence the direction and ensure services that the community has come to know and rely on remain in place.

4. Do you have a best volunteer memory/reflection?

My most memorable experience was in 2020. With the onset of COVID and all of the unknowns, everything around us quickly came to a halt and organizations questioned how they would take care of their clients, employees and businesses. I was amazed by the outpouring of donations and financial support provided within the community! It really showed how special our community is as well as the Threshold organization.

5. Is there anything you would say to other perspective volunteers?

Volunteers are always welcome to support and give of their time to the Threshold. There are plenty of opportunities and different ways that volunteers can make a meaningful difference to the Threshold.

Chad Uebersetzig
COO,KMC Stampings

ır



SCOTT MATHESON - Board Member

and shipping abilities. A good friend brought my attention to the Threshold organization, its abilities and core mission in life. Upon meeting their team and seeing firsthand how they operate, we were "all-in" and have been to this very day.

Then one day out of the blue while visiting their warehouse, I was asked if I would be interested in potentially becoming a member of the Threshold's board. I'll never forget that moment as I then reflected on one of my own quotes I've used when helping our country's future generations: "Meaningful

opportunities unfold in life as often as one dares allow...". I said, "you bet" while recognizing that this too may be my opportunity to participate in helping the Threshold's core mission of making a real difference in human lives.

To this very day, my most rewarding experiences within the Threshold organization are not simply how good they are at what they do, but rather seeing the successes within the clients themselves, the smiles as they wave their hands and hearing the genuine stories from them telling me how much they have "got done" working today. As a business owner, this gentleman has little doubt that each of these clients truly appreciate the paychecks they've earned while working at the Threshold's TTI Industries.

The Threshold, its mission and its team make a difference in lives every single day and thus, so too can we, when we help them by volunteering our time and energies beyond the scope of our own lives, it matters!

Stay Positive, Test Negative and Live Life by Making a Difference...

Scott Matheson Owner, Whitetail'R

OUR DONORS ARE MAKING A DIFFERENCE

The reasons for giving to the Threshold are as varied as the people who give. After speaking with several of our donors to ask if they would like to be featured in this report, the message from ALL was clear -Thank you, but we do not give for the recognition - we give because we care and we want to help! Bless their hearts! Some have served our agency in a volunteer capacity. Some have given to us through examples set by their friends. Some have family members who have or are receiving services from our agency. Some give because they see us as a great

resource for the community.
Some give because our organization is financially transparent, we have good leadership and our community holds us in high regard. Some simply believe in our mission and the people we serve. Whatever the reasons, we are humbly blessed to have these people step up and help us sustain our programs. Whether they give of their time or treasure, they are enriching the lives of everyone we serve!

THANK YOU to all of our wonderful donors!

IRV & THERESA SCHROEDER - Volunteers



Irv and Theresa have done many wonderful things for our agency over the years! Anything from making fence posts which clients in Senior Day Services decorated, selling tickets to the Packer Tailgate Tour, to helping dole out food during our monthly hosting of Feeding America at our LVS Center, Theresa and Irv are always willing to help! We asked them "WHY" they volunteer and here is their response:

"We have been asked many times why we volunteer. The answer is simple - BECAUSE YOU CAN that's right - YOU can. In our younger days, we helped with church picnics, VFW projects, 4H and more. So when we retired, we just found more places to help. Actually, some of them found us! Our niece was an employee at the Threshold Senior Day Services. She asked if we could help with bingo. Well that led to many other projects that we helped with over the years (Christmas & Valentine parties, woodworking, greeting cards, crafts, etc.). It has been very rewarding for us. Like we said BECAUSE YOU CAN."

Thank you Theresa and Irv! You are a blessing to our organization and we appreciate everything you are doing to help us in our mission!

SUMMER YOUTH COMMUNITY PROGRAM

Summer Youth is a fun-filled community-based program for young people with disabilities aged 10-20 years old, with an emphasis on building friendships, connecting with peers and making connections in the community during the summer months. The program offers parents respite and peace of mind, knowing their children are cared for while they are at work or taking care of other important obligations. Please call 262-338-1188, extension 564 for more information.



Kate & Gage give a goat a hug at the petting zoo

SENIOR DAY SERVICES



Beatrice Kiesow is making salsa for a fiesta party at for more information.

The Threshold Senior Day Service program offers busy, fun-filled days to retired seniors with cognitive and physical disabilities and memory loss. The Dennis Stockhausen Senior Center located at 2380 W. Washington Street in West Bend gives participants convenient access to our many county resources. The inviting, home-like facility is ideal for seniors to relax as well as partake in any of the many activities offered both in-house and throughout the community. Please call 262-338-4431, extension 450

FROEDTERT WEST BEND HOSPITAL PROJECT SEARCH PROGRAM

OUR NEWEST PROGRAM!

We are pleased to share that Froedtert West Bend Hospital has awarded the Threshold the opportunity to operate their Adult Project SEARCH Program, which launched in October of 2021. This program served four adults with disabilities wishing to gain marketable job-seeking skills with a goal to find community employment. The program takes place at Froedtert West Bend Hospital campus, offering on-the-job internships in various hospital departments. We are thankful for this new opportunity and for the partnership with Froedtert West Bend Hospital! Please call 262-685-8275 to learn more.



Robby Harris - Environmental Services

WEST BEND MUTUAL INSURANCE PROJECT SEARCH PROGRAM

Project SEARCH is a nationally recognized one-year transition program for students with disabilities who are in their last year of high school. Students gain job and soft skills to prepare them for successful, competitive, community employment. Our Project SEARCH program takes place at West Bend Mutual Insurance, Delta Defense and West Bend School District, where immersion in the workplace facilitates learning marketable and transferrable job skills. Please contact the Project SEARCH Program Manager at 262-685-8277, or the Student Services Program Administrator at (262) 335-5433 for more information.



WBMI Project SEARCH Class of 2021 - 2022



Katya works as a Merchandising Assistant in the West Bend Mutual "Silver Lining Label" clothing store.

ADULT DAY SERVICES

The Adult Day Services program is a multi-faceted service and focuses on building self-reliance, self-esteem and independence in all areas of life skills, including social connections, cultural and recreational experiences. We serve people with varying levels and types of disabilities including physical, cognitive and those with traumatic brain injury. Services are available at our primary location - 600 Rolfs Avenue and throughout Washington and surrounding counties. Please call 262-338-1188, extension 553 for more information.



Yay! David Lull is happy it is puzzle day.



Sara Stockinger is using her craft skills.



John Grennier entertains everyone by playing piano and singing.



Alayna Kidd enjoys singing along with her favorite songs using an iPad.

ACHIEVE EMPLOYMENT

Achieve Employment offers valuable services to assist people with disabilities in developing employable workplace skills. These acquired skills assist clients in gaining a competitive edge when seeking employment. We provide an individualized, successful plan to help clients reach their vocational goals. For more information about Achieve Employment, call 262-685-8275.



Johanna Klemann is busy making bread at Fox Bros. Piggly Wiggly in Richfield/Hubertus.



COMMUNITY EMPLOYER PARTNERSHIP LISTING

Lori's Costume Shop - West Bend

All-In Books - West Bend AmericInn - Hartford Aurora Clinic - Hartford Blue Lotus Farm & Retreat Center - West Bend Bob's on Main Street - West Bend Boys & Girls Club of West Bend Buffalo Wild Wings - West Bend Clean Sweep - West Bend Cousin's Subs - Kewaskum & West Bend Culvers - West Bend Dairy Queen - West Bend, Kewaskum & Jackson Eden Meat Market & Catering - Eden Enercon Corp - Germantown Erin Enterprises - Kewaskum & Campbellsport Fleet Farm of West Bend Gateway Café - Kewaskum Goodwill Industries - West Bend Guy & O'Neill - Fredonia Hahn's Ace Hardware - Hartford Jack Russell Memorial Library - Hartford Kewaskum School District Key Logo - Hartford King Pin - Campbellsport King Pin - West Bend Kool Kids - West Bend & Jackson

Kwik Trip - West Bend & Hartford

Marshalls/TJ Maxx - West Bend Metal Craft of West Bend Momentum Early Learning Center - Germantown Midwest Foods & Tobacco - Jackson Old Germantown Restaurant Paradise Gardens & Nursery – West Bend Piggly Wiggly – Fox Brothers Locations Washington County Geidel's Piggly Wiggly - Kewaskum Planet Fitness - West Bend Play 'n for Pennies - West Bend Habitat for Humanity Restore of Washington County Riveredge Nature Center - Saukville Riverside Brewery St. Vincent De Paul - Hartford, Slinger & West Bend TASC Services - Slinger School Tennies Ace Hardware - West Bend Texas Roadhouse - West Bend Topper's Pizza - West Bend Wellington Place - Hartford West Bend Community Garden West Bend Community Memorial Library

CLEAN SWEEP



Paul Bass poses with his broom during cleanup in the cafeteria at Rolfs. $\,$

Clean Sweep is a full janitorial service providing routine nightly office cleaning to local businesses. All of our employees are insured and bonded. Clean Sweep is a profitable division of the Threshold and 63% of employees have a disability. Please call 262-338-1188, extension 543 for a free, no-obligation quote or if you would like to join our Clean Sweep team!

THESHOLD SENIOR MANAGEMENT TEAM



John Bloor Executive Director



Michael Hoffman Associate Director



Xpressions Unique Boutique - West Bend

Kettle Moraine YMCA - West Bend

Elizabeth Ahlgren
Director of
Human Resources
& Safety



Terry Bloom
Director of
Finance &
Administration

YOUTH MENTOR

This is an after school and weekend program that offers activities including daily living skills and respite to youth and their families. Skill building may take place at their home as well as in community settings. For more information about this program, call 262-338-1188, ext. 553.



Gianna N. enjoys the unique experience that is West Bend Geocaching at Regner Park, offered by the West Bend Area Chamber of Commerce! So many options for activities are available to young people in this program. It offers time for the family to take care of daily tasks and is TONS OF FUN for the young people in the program!



Laura Eggert
Director of Public
Relations & Fund
Development



Nicole Leszynski Director of Day Program Services



Laura Paepke Director of TTI Industries



Jami Sickler Director of Employment Services

"Leadership is the capacity to translate vision into reality."

LINK

LINK is a Day Service program choice offered by the Threshold. LINK is an option specifically offered to people interested in socialization. participation in life skills activities, recreational activities and community-based activities with peers that have similar abilities and interests.

If you would like more information about the program, please call 262-338-1188, extension 553.



Look behind you! Rachel Thomson poses with a polar bear

Davi & Karen Alliet Allan & Nichola Alsberg American Construction Services Inc American Legion Auxiliary #483 Kurt & Marie Armbrust Kathleen Arnold Association of Equipment Manufacturers Rosemary Axtell Sandra Backhaus Donald Baierl Dorothy G. Barnes Frank Barrie Charleen Barutha Chervl Beall Jill Becker Lorraine Beine Ralph & Mary Beine Richard & Susanne Beine Donald & Eileen Bell James & Judith Benike Michael & Sherry Berend Nancy Berger Joseph Bertram Linda Bever Claire Bierman Mark A or Judy A Biertzer Gerald & Rita Bingen John & Maxine Biskobing Paul & Christine Bisset Amy Boettge Mary Bogenschneider James & Kerrie Bohn Adeline Bollen Deanna Borns Martin & Karen Borresen Geraldine Bowerman Lenore Brady Robert & Diane Brandmeier **Brath Family** James & Tracy Breuer Lisa Bright Michael & Beth Brown Rita Bruckert Sylvia Bruskiewicz Diane Buchel Dawn Buckley Darnell & Crystal Burg Dennis & Donna Carroll Norbert & Lucy Carter Lee & Kathleen Carter Timothy & Kristin Casper Flizabeth Ceman Sue Chesak

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fulfillment needs to its customers.

manufacturing business that offers kitting,

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We provide efficient, high quality and cost

annual 5% tax credit on work billed, up

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tion on how TTI can help your business,

Written by Standard Process: "Standard

Process® is a whole food-based supplement

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lence. TTI has assembled our test kits since

2013, during which time they have met our

considerable expectations and allowed us

to focus on our mission of changing lives."

Joe & Nancy Leach

Tim & Sandy Leitheiser

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Ned & Carolyn Lepien

call 262-438-0030, extension 410.

company who partners with health care

effective services. If you contract with

TTI Industries, you are eligible for an

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Dolores Wolf

\$5,600 Free Sweepstakes

Now thru April 13 you can enter to win \$5,000, \$500 or \$100 CASH by filling out the two sweepstakes tickets below (no copies or faxes accepted - original tickets only) and sending them to the Threshold to arrive no later than April 13, 2022.

The random drawing will take place April 14, 2022 at our main offices by a community member. You need NOT be present to win - winners will be notified by April 15, 2022.

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WHAT IS A SPECIAL NEEDS TRUST?

To preserve the public assistance | a special-needs type of trust. benefits of a person with a disability, such as a child with a developmental disability, many people use a "Special Needs Trust."

Medicaid, which pays medical expenses for the poor, has limits on the amount of assets that a recipient can own or can earn during each year that welfare benefits are paid.

A parent of a child with a disability should review each asset to see whether it will pass to that child at the time of the parent's death. For example, life insurance, annuities, IRAs, pension benefits, joint bank accounts, etc., often pass to persons other than those named in ones will or trust. If such assets pass to a disabled child, however, he or she may lose current government benefits. One must also decide whether to disinherit a child with a disability or use

The parents or other relatives of the disabled child generally establish special needs trusts. The trustee should have absolute discretion over how to expend the trust funds for the benefit of the disabled child:

Government benefits:

Government benefits should be used to meet basic needs such as food, clothing & shelter.

Special needs trust:

The funds from the trust should be used for supplementary needs such as utilities, medical care, special equipment, education, job training or entertainment.

SEEK PROFESSIONAL GUIDANCE:

Since the laws in this area are very complex and vary from state to state, experienced, knowledgeable legal counsel should be retained to draft the appropriate documents.

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