

Sample Letter to Friends and Relatives About a Special Needs Trust

Dear _____ [Recipient's Name],

I hope this message finds you well. We wanted to share an important update regarding our comprehensive Life Planning program for our beloved _____ [Child's Name]. Over the past few months, we've diligently worked on estate and financial planning to secure _____ [Child's Name]'s future, especially in the event something should happen to us.

Our primary reason for reaching out is to inform you about a special needs trust we've established for _____ [Child's Name]. This trust is designed to safeguard various assets and funds, ensuring they are available for _____ [Child's Name]'s "supplemental needs." It's essential to understand that to maintain _____ [Child's Name]'s eligibility for crucial government programs at the local, state, and federal levels, he must not receive funds directly in his name. Instead, any contributions, whether from us or anyone else, should be directed to the special trust we've named the " _____ [Special Needs Trust Name], Dated _____ [Date]."

Receiving funds exceeding \$2,000 directly could jeopardize _____ [Child's Name]'s eligibility for these vital government-provided special needs programs. We're not asking you or anyone else to contribute to _____ [Child's Name]'s trust. Our commitment is to provide for his future needs ourselves. However, in the event you wish to make a contribution, we wanted to ensure you understand the best way to do so without unintentionally affecting _____ [Child's Name]'s eligibility for essential government programs that we anticipate he will rely on throughout his life.

In essence, the process is straightforward. Please ensure that any funds are directed exclusively to the trust, known as the " _____ [Special Needs Trust Name], Dated _____ [Date]."

Your understanding and support mean a lot to us, and we're grateful to have you in
_____ [Child's Name]'s life.

Warm regards,

—

[Your Name]