



# NEWSLETTER

## SPEAKER MEETING: Special Needs Trust



### **Financial Options For Your Disabled Loved One**

**Presenters:**

*Barbara Loebner, an experienced attorney and Certified Specialist in Estate Planning, will discuss the importance of basic estate plan documents to managing your long-term needs and those of your children.*

Wednesday, Jan 16, 2018  
 6:30 to 7:00 Meet and Greet  
 7:00 to 8:30 Program & Q/A  
 Live Oak Senior Center  
 1777 Capitola Road, Santa Cruz  
 (Near 17th Ave)

**Bring your questions about estate planning, trusts, and more!**



**Topics:**

- Wills, revocable vs. irrevocable trusts
- Pros and Cons of a Special Needs Trusts (SNT)
- How is SSI, HUD subsidized, and Section 8 housing benefits affected?
- Can a trust cover medical, housing, and/or support services?

**FIND OUT ABOUT:**

- ❖ The role of a trustee and the pros/cons of selecting family vs. non-family members in this role.
- ❖ Define trustor, trustee and beneficiary roles.
- ❖ Explanation of the ABLE (Achieving a Better Life Experience) Act, and its current status, and how it works.
- ❖ What are personal support services, who/how they are provided to the ill family member and the pros/cons of alternatives.
- ❖ What is the Proxy Parent Foundation - and discuss the pros/cons.
- ❖ What is the financial power of attorney? When/how/if should be used with an ill family member?
- ❖ What is a medical directive? When/how/if it should be used with an ill family member?





**EDUCATION**

**NEW CLASSES STARTING IN JANUARY!**

*Our classes are no-cost, but do require registration ahead of time.  
For more information, please visit us online or contact the coordinators.*



Classes starting  
**Tuesday, January 15th**  
**6:00 p.m.**

To register or for more information, go to  
[www.namisc.org/basics.html](http://www.namisc.org/basics.html)

Or contact Emily Chapman at (831)-239-3401 or [ebc73@comcast.net](mailto:ebc73@comcast.net)



TWO classes starting  
**Tuesday, January 8th**  
**at 6:30 p.m.**  
or  
**Wednesday, January 16th**  
**6:30 p.m.**

To register or for more information, go to  
[www.namisc.org/family-to-family.html](http://www.namisc.org/family-to-family.html)

Or contact Fay Rector at (831)-288-0343 or [rectorf@yahoo.com](mailto:rectorf@yahoo.com)



Classes starting  
**Thursday, January 24th**  
**7:00 p.m.**

To register or for more information, go to  
[www.namisc.org/peer-to-peer.html](http://www.namisc.org/peer-to-peer.html)

Or contact Anastasia at (831)-824-0406 or [anastasia@namisc.org](mailto:anastasia@namisc.org)

**NAMI SUPPORT GROUPS**

**NAMI Support Groups for Family Members**

Free, regular groups for family members and loved ones of those living with mental illness. Drop-ins are welcome.

**Thursday Night Group 7:00 - 8:30 p.m.**

Live Oak Family Resource Center  
1740 17th Avenue, Santa Cruz

**Family Members of Young Adults (16-26)**

1st and 3rd Thursdays 6:30 - 8:30 p.m.  
NAMI SCC Office 542 Ocean Street, #F, Santa Cruz  
Parking in Back or on street

**Family Support for Spanish Speakers**

1st and 3rd Tuesdays 7:00 -8:30 p.m.  
Mariposa Wellness Center 10 Carr Street, Watsonville  
Call the Mariposa Center for more info:(831)-768-8132



**NAMI Peer Connection Support Groups**

Free, regular groups for adults with mental health challenges. Drop-ins are welcome.

**Wednesdays at 1:00-2:30 p.m.**

Sash Mill Plaza 303 Potrero St, Bldg 42, Ste 103

**Mondays at 12:30 -2:00 p.m.**

MHCAN in Piano Room 1051 Cayuga St.

**HOPE Bipolar/Depression Support Group**

Christian-based support group for both family members and peers. All are welcome, of all beliefs.

**2nd and 4th Tuesdays 6:30 - 8:15 p.m.**

Santa Cruz Bible Church at 440 Frederick St.  
Room 22, 2nd floor of Worship Center  
For more info call Janice Seals at (831)-336-5740 .