



VIRTUAL WORKSHOP

Comparing ABLE Accounts with 1st and 3rd Party Special Needs Trusts

Tues., NOVEMBER 17, 2020

6:00 PM -7:00 PM

Link to Zoom Meeting will be sent
prior to the event.

Savings Options for People
Receiving Needs Based
Benefits. What Works and
What to Avoid.

The presenter will discuss the use
of ABLE accounts, first party
special needs trusts and common
pitfalls to avoid when saving for a
disabled individual's future.

**There is no charge to attend, but
ADVANCE REGISTRATION IS
REQUIRED**
email pcarlson@icanthrive.org
or call
508-485-4227 Ext 1115

Many advocates have heard of the ABLE Act which allows some individuals who are disabled to save up to \$15,000 per year in a tax protected savings account similar to a 529 Account. If properly funded, this account is not deemed as a resource when determining eligibility for SSI or MassHealth.

Theresa Varnet, M.S.W., J.D. will review when it's appropriate to use ABLE Accounts and when it is recommended that a 1st or 3rd Party Special Needs Trust may be the better future planning option.



*Theresa is a certified social worker
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