

Special Needs Pooled Trusts



A special needs trust assures a more secure future for your loved one with intellectual, developmental or cognitive disabilities. For many families, the choice of a competent and caring trustee can be difficult to find.

ARCA's special needs pooled trusts are secure; they are isolated from operational accounts, with each individual trust established as a sub-account. Oversight of ARCA's special needs pooled trusts is vested in the ARCA Foundation Board of Directors.

ARCA has established a multidisciplinary process to assure fund withdrawals meet the needs of the individual and are in accordance with applicable regulations.

ARCA is honored to continue providing life-long services to the cherished individuals in our care.

*Creating opportunities
for a bright tomorrow*



*Working together to open doors for people with
intellectual, developmental and cognitive disabilities
to be valued members of the community.*

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Helping your loved ones with intellectual, developmental or cognitive disabilities **live great lives** is your goal, and ours. As partners in this ongoing journey, ARCA can work with you to simplify the process of providing for your family member living with a disability throughout his or her lifetime.

Providing for our loved ones with special needs



ARCA's special needs grantor and donor pooled trusts were established to help our individuals and families reach their individual goals of providing long-term financial support for loved ones. We invite you to learn more about these opportunities to:

- protect your family member from future financial hardship
- assure your family member will maintain government benefits
- supplement government benefits with quality of life services such as trips to see family, cultural and educational experiences, non-covered medical or dental costs, special nursing care or therapy ~even basic supplies.

Designed to meet the needs of people of moderate means, either special needs pooled trust:

- can be established with minimum balance of only \$100
- can receive additional contributions.

ARCA Foundation Grantor Pooled Trust

Any person with intellectual and developmental disabilities under 65 years of age who depends on publicly funded programs for basic needs should consider a special needs Grantor Trust for money received in his or her own right. This Trust will assure money received by your loved one will be available for quality of life activities not covered by government funding.

For example, if your brother receives a Social Security back payment, an inheritance settlement or has accrued wages in excess of \$2,000, opening an ARCA special needs Grantor Trust would ensure he continues to receive essential government resources and has access to funds for special needs.

Any balance remaining at the death of the beneficiary remains with ARCA.

ARCA Foundation Donor Pooled Trust

Any person wishing to provide supplemental funding to a person with intellectual, developmental or cognitive disabilities should consider a special needs Donor Pooled Trust, which can be funded today, or upon the death of the donor.

This Trust will assure money intended for your loved one will be available for quality of life activities not covered by government funding.

ARCA's special needs Donor Pooled Trust is perfect for both families with financial resources now and families who might wish to name the special needs Trust in their will. Funds are available for the benefit of your loved one during his or her lifetime. Any amount remaining after his or her death can go to benefit others, including ARCA.