



SHARED HORIZONS

ENHANCING LIVES, PROTECTING FUTURES

OUR PURPOSE

PROTECT
Public Benefits

PROVIDE
Goods & Services

PRESERVE
Assets/Funds

Shared Horizons Administers Two Types of Pooled Special Needs Trusts

1. The Wesley Vinner Trust, a SELF-FUNDED or 1st PARTY special needs trust.
2. The Third-Party Community Trust is established and funded with someone else's money, usually part of an estate plan or will.

Call if other Trust options are needed – we may be able to assist!

Why Choose Shared Horizons?

- Our Trusts have been reviewed and approved by Social Security & DC, MD, TN & GA State Medicaid Programs.
- We are a professional trust service organization.
- Our request process is easy and user-friendly.
- We are local – which allows a hands-on approach to trust management.
- We develop individualized Quality of Life Plans and Budgets.
- We have Board oversight

See Social Security Act §1917(d); 42 U.S.C. §1396p(d) or
MA Policy, Exhibit VI-1,
Asset Limits in the D.H.S. IMA Policy Manual

OUR MISSION:

To help people with disabilities and their families access an affordable Special Needs Trust option that will protect their benefits while preserving their personal finances.

Shared Horizons, Inc.

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What is the Wesley Vinner Memorial Trust?

The Wesley Vinner Memorial Trust is a pooled special needs trust administered by Shared Horizons, Inc. Shared Horizons is a nonprofit organization incorporated in Washington, DC.

- **Suppose you have a disability and earn, inherit, or receive a lump sum of money over the \$2,000 SSI limit or the state's Medicaid limit. In that case, you can create an account within the Wesley Vinner Memorial Trust.**

*- See Social Security Act § 1917 (d); 42 USC § 1396p (d) or MA Policy, Exhibit VI-1
Asset Limits in the DHS. IMA Policy Manual*

Who can join?

Anyone with a disability eligible to receive public benefits from the District of Columbia, Maryland, Tennessee and Georgia, can establish a sub-account.

- **STANDARD SELF-FUNDED.** A self-funded Trust means the money used to fund the Trust belongs to the person with the disability, whether earned, inherited or, obtained through settlement or lottery proceeds, etc.
- **PILOT DEPOSIT PROGRAM.** The Board of Directors sanctioned the Pilot Program's creation in response to a growing number of employed people with limited needs and could not "spend down" month to month.
 - The program offers a reduced initial deposit, enrollment fee, and a low annual fee.
 - Our Pilot Program is a perfect option for residents receiving services through the DDA system who are "over-resourced" due to the Contribution of Cost of Care changes.

Call 202-448-1460 for more information.

Important Things to Remember About the Vinner Trust:

- The money used to establish the Trust belongs to the beneficiary.
- Funds remaining in the Trust upon beneficiary's death are subject to a Medicaid payback.

What is the Shared Horizons' Third-Party Community Trust?

- Whether part of the pool or stand-alone, the Third-Party Trust is established and funded by a Third-Party.
- This Trust is an affordable, practical option for family and friends interested in contributing to a loved one's quality of life without jeopardizing their benefits.
- The Trust is established through a living (or inter-vivos) trust or a testamentary trust created by the terms of a will.
- This Trust is an ideal option for parents & loved ones who want to provide gifts and bequests to a person who has a disability. We encourage you to work with an Estate Planning Attorney to ensure your Estate Plan and documents are in order.
- They can receive gifts and bequests from any third party, including parents, friends, and other family members. Once you establish the Trust, make sure you share the information with family and friends to contribute to or bequeath funds to the account.
- It can be a flexible tool for attorneys to meet their client's unique needs by providing a cost-effective option addressing the current or potential needs of a loved one. Having an experienced pooled trust as an option will allow counsel to make confident recommendations to their client, eliminate some of the hazards associated with family trustees, and provide an additional planning choice to the traditional third-party special needs trust.

Important Things to Remember About the Third-Party Trust:

- Should be part of your **estate plan** and created simultaneously.
- The money used to establish the Trust belongs to someone else.
- Funds remaining in the Trust upon beneficiary's death are distributed according to grantor's instructions provided in the Joinder Agreement.

Sample Uses of Special Needs Trust Funds

Medical Expenses & Equipment (not covered by benefits)
Telephone, Internet & Cable
Electronics
Vacations
Transportation
Entertainment & Recreation
Clothing
Education
Supplemental nursing care & dietary needs
Insurance Premiums (except Life Insurance)
Home Modifications & Repairs
Hobbies
Memberships
Case/Care Management

Call Our Office for a More Comprehensive List

For more information about Pooled Special Needs Trust options, and how funds may be used, contact one of the team members listed below at (202)448-1460:

Yolanda Mazyck, CEO

Tresa Welch, COO

Ora Murray, Director of Trust Services

Sharee Day-Fitzgerald, Director of Finance

Derek Cohill, Office/IT Manager

Patricia Williams, Trust Administrator

Melhina Pena, Trust Administrator

Laconte Saunders, Bookkeeper

Roman Hoskins, Trust Specialist

Quintina Hampton, Resource Specialist

Debra Watson, Administrative Assistant

Ed Varrone, Esq., Legal Counsel