

# Special Needs Trusts

November 16, 2017

Tennessee Bar Center – Nashville, Tenn.



**Total Credits:** 2 General, 1 Dual

**Moderator:** Timothy Takacs, Takacs McGinnis Elder Care Law PLLC

**Producer:** Darlene A. Kemp, Executive Director of Vista Points Inc.

Lawyers, in conjunction with financial advisors and other professions often need specialized guidance to assist in advising clients who are living with a disability. Clients may include people living with a physical, mental or intellectual disability. This program will navigate through the tax code to maximize advantages for Qualified Disability Trusts and discuss ethical considerations of using a trust to qualify for Medicaid. There are many duties and ethics associated with serving as a trustee – learn about these pitfalls in this specialized program.

This program is sponsored by Vista Points, The Special Needs & Resource Center.

8:30 a.m. – 9 a.m.



**Registration/Welcome/Breakfast**

**Breakfast sponsored by: Vista Points**

9 a.m. – 10 a.m.

**Qualified Disability Trusts and Tax Advantages**

Travenia A. Holden, Holden Law Office

10 a.m. – 11 a.m.

**The Ethics of Using a Trust to Qualify for Medicaid**

Barbara McGinnis, Takacs McGinnis Elder Care Law PLLC

11 a.m. – 11:15 a.m.



**Break**

11:15 a.m. – 12:15 p.m.

**(DUAL)**

**The Uniqueness of Serving as a Trustee of a Special Needs Trusts: Duties, Ethics and Pitfalls**

John Robert Toy II, Parker Toy & Associates