



## Special Needs Planning Immersion Camp

September 14 – 15, 2016

Dex Media Hotel & Conference Center, Dallas, TX

### Day 1 – Wednesday, September 14, 8:00 a.m. – 5:30 p.m. CT

7:30 a.m.

**Breakfast (provided)**

8:00 a.m.

**Welcome and Overview**

**Understanding What it Means to Have a Special Needs Planning Practice**

(Slides 3 – 45)

9:00 a.m.

**Benefit Basics – SSI, Medicaid**

(Slides 46 – 79)

10:00 a.m.

**Break**

10:15 a.m.

**Benefit Basics –Section 8**

(Slides 80 – 91)

10:45 a.m.

**Special Needs Trust Basics**

(Slides 92 – 103)

**First Party vs. Third Party Special Needs Trusts**

(Slides 104 – 114)

12:00 p.m.

**Lunch (provided)**

1:00 p.m.

**Alternative and Future Options – ABLE & Special Needs Trust Fairness Act**

(Slides 115 – 123)

1:30 p.m.

**A Closer Look: First Party Special Needs Trusts**

(Slide 124 – 148)

**First Party Case Studies**

(Slides 149 – 168)

3:15 p.m.

**Break**

3:30 p.m.

**A Closer Look: Third Party Special Needs Trust**  
(Slide 171 – 209)

5:30 p.m.

**Adjourn**

5:45 p.m.

**One-Hour Reception**

**Day 2 – Thursday, September 15, 8:00 a.m. – 12:00 p.m. CT**

7:30 a.m.

**Breakfast (provided)**

8:00 a.m.

**Third Party Trust Tax Treatment**

(Slides 210 – 217)

**Funding a Third Party Trust with Retirement Funds**

(Slides 218 – 228)

10:00 a.m.

**Break**

10:15 a.m.

**Putting it All Together – Case Studies**

(Slides 229 - 254)

**Building Your Special Needs Planning Practice**

(Slides 255 – 279)

12:00 p.m.

**Adjourn**

**Optional Lunch (provided)**