

# PERSONAL CARE AND CONCERN FOR YOU

Individual attention and accountability are top priorities for The Disability Foundation staff. We take our responsibility to our beneficiaries and families very seriously and are often on a first name basis with the individuals we serve. It's this personal connection and attention to detail that so many of our clients depend on when it comes to establishing a trust for their financial resources.



THE DISABILITY  
FOUNDATION

## LET US HELP YOU!

It's simple to start the conversation about whether a pooled trust is right for you and those you love, just give us a call.

### The Disability Foundation

40 N. Main Street, Suite 500

Dayton, OH 45423

937-225-9939

937-222-0636 (fax)

gdarling@daytonfoundation.org

Answering questions and helping people navigate all aspects of a special needs trust is why we're here, but if you want some more information during non-business hours, visit our web site:

[Disability-Foundation.org](http://Disability-Foundation.org)



**A supporting organization of The Dayton Foundation**

*The Disability Foundation maintains its own 501(c)(3) tax-exempt status and receives backing from The Dayton Foundation to support daily activities and monitor financials.*

# PLAN AND PROTECT THE ONES YOU LOVE



***We can help you financially care for those you love and plan for their financial future without impacting public benefits.***



THE DISABILITY  
FOUNDATION

***Enriching lives, securing futures.***

# A PARTNER YOU CAN TRUST

Since its inception, The Disability Foundation has distributed almost \$12 million dollars to individuals with disabilities through pooled trusts improving the quality of life for hundreds of people with disabilities.

Things like travel, participation in the Special Olympics, a tropical fish tank, college tuition, entertainment, wheelchair ramps, home repairs and so much more are possible for individuals with disabilities who receive government assistance.

No matter how someone chooses to use their pooled trust, each trust helps someone with a disability to improve or enhance his or her quality of life in ways that are often not otherwise possible for individuals relying on public benefits.



## TYPES OF SPECIAL NEEDS TRUSTS

Individuals who participate in either of these trusts can still qualify for and benefit from Medicaid and Supplemental Security Income while preserving assets to pay for supplemental needs, safely setting aside funds for their loved one's future.

### **The Ohio Community Pooled Annuity Trust (OCPAT)**

provides a lifetime plan of payments. When a donor sets up an account in this trust, an annuity calculation is made and a monthly benefit determined. Each month that amount is deposited into the individual's spending account. The monthly benefit is guaranteed for the life of the individual.

### **The Ohio Community Pooled Flexible-Spending Trust**

provides an option for families who do not want the annuity limitation in the OCPAT. The only limit on the amount that can be spent is the amount in the individual's account. This provides more flexibility if a major purchase is required.

# SETTING UP A TRUST IS SIMPLE

Whether you are an individual with a disability, a family member, guardian or an advocate exploring the establishment of a trust, The Disability Foundation will guide and direct you each step of the way.

Our experienced staff enjoys helping families and individuals make choices about their financial future.

It is important to realize that once trusts are established, they are irrevocable. Therefore, it is crucial that you fully understand each one, and our team of professionals is here to help you each step of the way.

