

PROGRAMME

- **SPECIAL CARE TRUSTS, CHARITABLE GIVING UPDATE**

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What is the special care trust?

- History
- Who it's for
- How it works



The JCF Special Care Trust

Parents of disabled adult children

- Who it's for
- The contract
- The Trust
 - Beneficiary
 - Trustee(s)
 - Budget considerations
 - What expenses might be covered



Parents of disabled adult children (cont'd)

- The Will
- Sample will clause

Trust in favour of my child:

Should my spouse predecease me, I hereby bequeath the residue of all my property, movable and immovable, to be transferred to an autonomous and distinct trust patrimony which I am constituting under the terms of the present legacy, to be appropriated to the benefit of my child

Examples of Ways the Income can be used:

Maintenance, upkeep, education, medical needs as well as to pay any other expenses of any nature whatsoever effected for the benefit of my child



The JCF Special Care Trust

Seniors living alone

- Who it's for
- The mandate
- The trust
 - Beneficiary
 - Trustees
- The contract

Question: What happens on death of the senior and adult child?



Agence Ometz Care packages

Community Living Support Packages include:

- Regular home visits
- Regular telephone contact
- Services of a professional case manager
- Access to a wide variety of group services
- Activities programmes



Checklist

- Housing
- Food
- Budgeting/Bills
- Transportation
- Self Care



checklist (cont'd)

- Housekeeping
- Social contact/activities
- Holidays
- Birthdays



checklist (cont'd)

- Healthcare maintenance
- Vocational training
- General advocacy
- Contact and support



Support Services for the Elderly CJCS

- Services provided
- Requirements
 - Prearranged, prepaid funeral
 - Copy of mandate, including medical directives
 - Evidence of competency



Other considerations

- Fees
- Role of the family
- Risk factors
 - Family problems
 - What happens if the money runs out?