

# S.A.L.T. – School to Adult Life Transition Series & SALT TEENS - Wednesday, April 24, 2019

## Financial Planning: Comparing the STABLE Account & Special Needs Trust

### SAVE FOR THE FUTURE AND KEEP YOUR BENEFITS

#### Why STABLE?

- Raises your asset limits
- Tax-free savings
- Easy enrollment



**& SPECIAL NEEDS TRUSTS**

stableaccount.com

#### Meeting Location

Warren C Young Center (Auditorium)  
801 Drake Road, Lebanon

Wednesday, April 24, 2019  
Time: 6:00 – 7:30 pm

#### SALT-TEENS

(Student Series held at the same time as SALT)

**Budgeting in the Real World**

These trainings are being brought to you by the Employment First Local Leaders Collaboration of Montgomery, Greene & Warren Counties

## SALT: Comparing the STABLE Account & Special Needs Trust

Special Guest Speakers:

Doug Jackson; Deputy Director, STABLE, Office of the Ohio Treasurer of State  
Laura Drake, Attorney at Law, Esq, CFMF Southern Ohio Associate Director

Join SALT during the month of April as our guest speakers from the STABLE Account and Special Needs Trust Fund have teamed together to explain the differences between the Stable and Trusts accounts, how they can work together to complement each other without affecting your child's benefits.

**Come prepared to learn more about these important saving vessels.**

**This session will offer an opportunity for participants to learn:**

- What is a STABLE Account & how does it work?
- How do we apply? What are the eligibility requirements?
- What is a Special Needs Trust?
- What are some things to consider about trusts?
- What benefits does a pooled trust offer?
- How can a Stable Account be used in combination with a trust to secure my child's financial future?
- Are there restrictions on how my child can use either account?

Saving for a secure financial future or an emergency fund has always been a challenge for individuals with disabilities. Please feel free to invite another family member or friend to attend this session with you.

## SALT TEENS: Budgeting in the Real World

Facilitators: Warren Co Board of Developmental Disabilities

Through fun games and interactive activities, the students will learn about budgeting, spending and saving.

Questions??? Contact SALT at email [prtpattis@gmail.com](mailto:prtpattis@gmail.com) or  
Brittany Conner at [brittany.conner@warrencountydd.org](mailto:brittany.conner@warrencountydd.org)