

"We believe that all human beings have a fundamental right to be treated with dignity and respect. That's why, for more than 50 years, we have advocated on behalf of and provided services to individuals with special needs and older adults. It's also why we provide a comprehensive array of services to help those who are unable to manage their daily affairs. Providing Guardianship/Trusts and Representative Payee Services is a natural extension of everything we do and everything we believe in. Our agency is built on experience, commitment, integrity and dedication to the highest-quality services - just a few of the reasons why the Advocacy Alliance is the right choice for you."



ALEX J. HAZZOURI
Chief Executive Officer

OUR SERVICE AREA



★ Indicates Advocacy Alliance office location

The Advocacy Alliance not only provides Trust Services in our service area but throughout Pennsylvania.



TRUST SERVICES

POOLED TRUST

SPECIAL NEEDS
INDIVIDUAL PAYBACK TRUSTS

COMMON LAW
SPECIAL NEEDS TRUSTS

EDUCATION FUNDED
SPECIAL NEEDS TRUSTS

Services from an agency with a track record of trust



CONTACT



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A registered 501(c)(3) non-profit corporation

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EXPERIENCED

The Advocacy Alliance provides comprehensive, cost-effective financial and personal needs management services to individuals with special needs and older adults. We strive to maximize the safety, well-being and dignity of each individual and ensure that personal, medical, financial and budgeting decisions are made with each individual's wishes and best interests in mind.

Our Trust Services are audited regularly by independent auditors, and our customized financial-management software allows us to professionally manage and report an individual's finances.

Our Trust Services strive to meet each individual's needs, being mindful of their governmental benefits, and community services that are necessary to ensure an individual's basic well being. We include family members, as appropriate, throughout the decision-making process.

The Advocacy Alliance has a well-trained staff and decades of experience providing advocacy and compassionate fiduciary services to individuals with special needs and older adults.

TRUST SERVICES

The role of the Advocacy Alliance as trustee is to: manage the funds and invest them prudently; ensure that the individual who has a disability has access to these funds to improve his/her quality of life; ensure that the entitlements of the individual are not effected; and ensure that all reporting and other legal requirements are met.

"Pooled Trust" has one Master Trust Agreement for all members who join the "pool". The trust can be joined by the individual, a parent, grandparent, or ordered by the court with small amounts of money but pooled to maximize earning potential through investments. Although the money is pooled, each individual in the trust has an account tracking their monies. This trust can only be established by a non-profit organization.

Special Needs Individual "Payback Trusts" can be established by an individual, a parent, grandparent, guardian, or by a court. If the individual with a disability dies, the money left in the account is subject to pay back to Pennsylvania Department of Welfare for costs related to Medical Assistance.

"Common Law Special Needs Trusts" can be established with funds not belonging to the individual and thus are not subject to Medical Assistance payback. This trust can be created by a family member, a friend, or another entity but not the individual him/herself and the trustee must follow the guidelines of the trust agreement.

"Education Funded Special Needs Trusts" are funded by a school district through litigation for educational needs and compensation. These trusts are defined by the trust agreement and if the monies are not spent, they may return to the school district.

All of these trusts are irrevocable and thus cannot be changed once established. They are established under state and federal guidelines.

ADVANTAGES OF TRUSTS

- Established to enhance the individual with a disability's life without disaffecting government benefits (e.g., SSI and Waiver).
- Established as part of estate planning to gift an individual with a disability without disaffecting government benefits.
- Funds in trust are preserved and not "spent down" on unnecessary items to maintain an individual's eligibility for benefits.

For more information and frequently asked questions, go to www.theadvocacyalliance.org.



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