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Nota di contenuto	Cover -- Title Page -- Copyright -- Contents -- Acknowledgments -- About the Authors -- CHAPTER 1 Introduction of Planning for Special Needs with Trusts -- I. Demographics -- A. The Costs of Long-Term Care -- B. Why Plan to Become Eligible for Public Benefits? -- II. History of Trust Planning -- A. Early Trust Practice (No Holds Barred) -- B. MQT -- C. OBRA '93 -- D. Medicaid Trusts -- III. Distinctions between Self-Settled and Third-Party Trusts -- A. When Can a Self-Settled Trust Actually Be a Third-Party Trust? -- IV. Examples of Various Public Benefits Programs -- V. SNT Requirements Summary -- VI. Vocabulary -- CHAPTER 2 Ethical Issues and Fiduciary Representation -- I. Introduction -- II. Who Is the Client? -- A. First-Party Trusts: Is the Question, "Who Is the Client?" More Complicated? -- B. Third-Party SNTs: Is the Question, "Who Is the Client?" Easier to Answer? -- III. When an Attorney Represents the Trustee: The Ethical Issues -- IV. When the Attorney Is the Trustee (or Other Fiduciary) -- V. Does the Attorney for the Trustee Have Any Duty or Liability to the Trust Beneficiary? -- VI. Ability to Share Information with Nonclient Beneficiary -- A. What about Privileged Information? Is That Protected from Disclosure?
Sommario/riassunto	This book provides comprehensive guidance on planning for special

needs with trusts. It covers the demographics and costs associated with long-term care and the importance of planning to become eligible for public benefits. The book traces the history of trust planning and explains distinctions between self-settled and third-party trusts. It delves into ethical issues and fiduciary responsibilities, public benefits programs, and the intricacies of first-party and third-party special needs trusts. The book also explores alternatives to special needs trusts and provides appendices with practical tools like checklists and sample letters. Intended for legal professionals and those involved in trust and estate planning, it serves as an educational resource rather than legal advice.
