



Special Needs Trust Administration Certificate Core Competencies

- 100 Knowledge of the individual and available resources** – Knowledge of the beneficiary’s life circumstances and needs and using the resources available to address those needs.
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| 110 | Autonomy, independence and self-determination | 140 | Local/community services |
| 120 | Family dynamics/outside influences | 150 | Person-centered planning |
| 130 | Goals, needs and preferences | 160 | Spectrum of disabilities/capabilities |
- 200 Fiduciary Obligations** – Knowledge and application of the fiduciary obligations of those serving as a special needs trustee:
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| 210 | Confidentiality | 240 | Impartiality |
| 220 | Conflict of interest | 250 | Loyalty |
| 230 | Delegation | 260 | Selection of professionals |
- 300 Trustee Responsibilities** – Knowledge and application of the responsibilities required of those serving as a special needs trustee:
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| 310 | Accounting | 340 | Insurance |
| 320 | Bonding/restricted accounts | 350 | Investing |
| 330 | Employment issues, working, benefits | 360 | Reporting (court, Medicaid/Medi-CAL, SSA) |
- 400 Knowledge of public benefit programs** – Knowledge and application of the federal rules and regulations of public benefit programs as they relate to the role of the SNT administrator:
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| 410 | Housing programs | 450 | SSDI/CDB |
| 420 | Medicaid/Medi-CAL | 460 | SSI |
| 430 | Medicare | | |
- 500 Knowledge of the types of SNTs** – Knowledge and application of the variations among trust arrangements intended to protect public benefit eligibility:
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| 510 | Protectors/advisory committees | 540 | Third -party trusts |
| 520 | Self-settled trusts (d)(4)(A) | 550 | Trustee selection |
| 530 | Sole-benefit trusts | | |
- 600 Appropriate Disbursements** – Knowledge and application of the federal rules and regulations related to permissible disbursements in maintaining public benefit eligibility, including methods of disbursement:
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| 610 | Care management/services | 650 | Home ownership |
| 620 | Debt administration | 660 | Living expenses |
| 630 | Fees (legal, fiduciary, trustee) | 670 | Medical expenses |
| 640 | Funeral | 680 | Recreational expenses |
- 700 Taxation and Income Sources** – Knowledge and application of the federal taxation regulations related to administering a special needs trust:
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| 710 | Grantor trusts | 730 | Qualified disability trusts |
| 720 | Non-Grantor trusts | 740 | Income sources |
- 800 Rights and Benefits** – Knowledge and application of rights and benefits for persons with disabilities:
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|-----|------------------------------|-----|---------------------------|
| 810 | ABLE Act | 850 | HIPPA |
| 820 | ADA/504 | 860 | Supported decision making |
| 830 | Conservatorship/Guardianship | 870 | SECURE Act |