



Special Needs Trust (SNT) Certificate Program Study Sources

The links work best if you copy and paste them into your browser!

Able National Resource Center: www.ablenrc.org

Administering the Michigan Special Needs Trust: <https://www.amazon.com/Administering-Michigan-Special-Needs-Trust-ebook/dp/B083LJLZ69>

Administering the California Special Needs Trust: https://www.amazon.com/Administering-California-Special-Needs-Trust/dp/0578620715/ref=asc_df_0578620715/?tag=hyprod-20&linkCode=df0&hvadid=509199270928&hvpos=&hvnetw=g&hvrnd=8860839038527332720&hvpone=&hvptwo=&hvqmt=&hvdev=c&hvdvcmdl=&hvlocint=&hvlocphy=9006664&hvtargid=pla-878246289990&psc=1

National Guardianship Association's Standards of Practice: <https://www.guardianship.org/standards/>

CA Probate Code: <https://leginfo.legislature.ca.gov/faces/codesTOCSelected.xhtml?tocCode=PROB>

Centers for Medicare & Medicaid Services: Medicare & You 2022: www.medicare.gov/publications

DOL: <https://www.dol.gov/agencies/whd/flsa/misclassification>

IRS: Independent Contractor (Self-Employed) or Employee? <https://www.irs.gov/businesses/small-businesses-self-employed/independent-contractor-self-employed-or-employee>

Life Passages PSNT Best Practices Guidelines:

https://www.stetson.edu/law/academics/elder/home/media/Best_Practices_Guidelines_Final_42022.pdf

National Association of Surety Bond Producers (NASBP): What are Surety Bonds:

<https://www.nasbp.org/getabond/about-surety>

New York State Bar Association – Elder Law Section:

https://nysba.org/app/uploads/2020/02/GuidelinesforTrusteesofFirstPartySupplementalNeedsTrusts_brochure-smaller-June-2012.pdf

Professional Fiduciary Association of California's SNT Certificate Education: coming soon!

Settlement Solutions National Pooled Trust: Blog: Helping Your Client Select a Special Needs Trust:
<https://ssnpt.com/helping-your-client-select-a-special-needs-trust/>

Social Security Resources

Social Security Handbook: https://www.ssa.gov/OP_Home/handbook/handbook-toc.html

Red Book: <https://www.ssa.gov/pubs/EN-64-030.pdf>

SSDI and Other Disability Benefit Programs:

https://ca.db101.org/ca/programs/income_support/ssdi/program2d.htm

Social Security Program Operations Manual System (POMS): secure.ssa.gov/apps10/

Special Needs Alliance

General Information: <https://www.specialneedsalliance.org/special-needs-101/>

Handbook for Trustees: <https://www.specialneedsalliance.org/special-needs-101/free-trustee-handbook/>

Uniform Probate Code: <https://www.uniformlaws.org/committees/community-home?CommunityKey=35a4e3e3-de91-4527-aeec-26b1fc41b1c3>

Uniform Prudent Investor Act: <https://www.uniformlaws.org/viewdocument/final-act-108?CommunityKey=58f87d0a-3617-4635-a2af-9a4d02d119c9&tab=librarydocuments>

Uniform Trust Code: <https://www.uniformlaws.org/committees/community-home?communitykey=193ff839-7955-4846-8f3c-ce74ac23938d>

US Department of Veterans Affairs: VA pension benefits: <https://www.va.gov/pension/>