

The Guardian Trust Difference

Guardian Trust takes great pride in the high quality service we provide to our Beneficiaries, their families, and their professionals. It is our firm belief that our professional knowledge and ability to communicate effectively are the foundations of our success.

We take a very individualized approach to administering the Trusts and have extensive experience dealing with the special investment needs of those with disabilities.

For your peace of mind, we have professional oversight of all of our Trusts as well as professional liability insurances covering errors & omissions and theft of funds.

In addition, we utilize an independent CPA auditing firm to conduct an audit of all of our procedures and accountings.

The Trustee

The Trustee for the various Guardian Trusts is Guardian Trust Foundation, Inc. Beginning in 2002, the Guardian Trust Foundation operated as the National Non-Profit for Americans with Disabilities, Inc. The name was formally changed in 2015. The Foundation is a tax exempt, Florida non-profit corporation. It promotes and supports other organizations that provide goods, services or funding for individuals with disabilities.

Co-Trustees:



Travis D. Finchum*



Kole J. Long

Travis D. Finchum* and Kole J. Long serve as Co-Trustees. Mr. Finchum and Mr. Long are attorneys with Special Needs Lawyers, P.A., a law firm based in Clearwater, Florida.

**Mr. Finchum is Board Certified as an Elder Law specialist by the Florida Bar.*

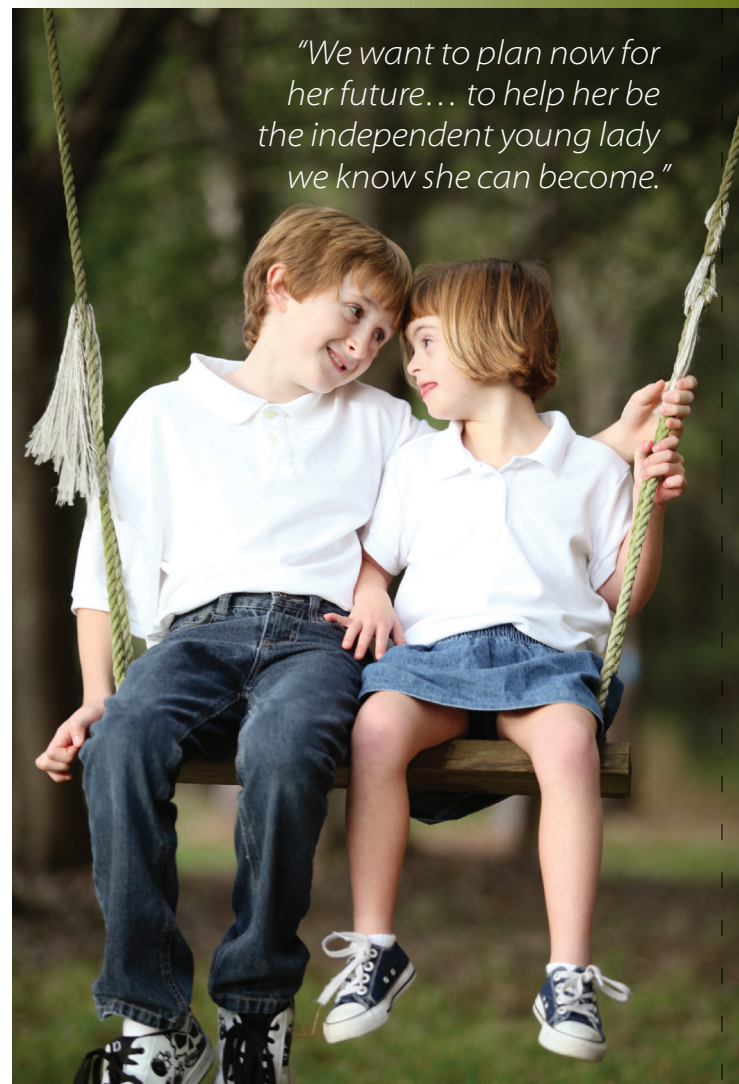
Investments:

We work with several investment firms to tailor our client's various investment needs. We fully investigate any investment advisor we work with to ensure we only work with the most qualified and cost effective advisors. More specific information regarding investments can be found on our website.

Guardian Trust

901 Chestnut Street, Suite C
Clearwater, FL 33756
Toll free: 800-669-2499
Fax: 727-754-5948
www.GuardianTrusts.org

Third-Party Trustee Services



"We want to plan now for her future... to help her be the independent young lady we know she can become."



Shielding the Financial Future of
Individuals with Disabilities

www.GuardianTrusts.org

What is a third-party SNT?

A third-party special needs trust is for parents and family members who want to provide for a person with special needs without disqualifying or interrupting public benefits eligibility. We hold, protect and administer “inherited” money for the individual in a professional, caring and cost-effective manner.

We serve as Trustee for individual third-party SNTs or a family member can utilize our already established Third-Party Pooled Special Needs Trust.

Any funds placed into a third-party SNT are not subject to Medicaid payback and can be distributed to designated heirs or beneficiaries.



Who will take care of your loved one when something happens to you?

This is the biggest question for many parents. There will need to be trusted caregivers and trusted money managers. Guardian Trust understands special needs. Our team is professional, courteous and empathetic. We have a large referral network of professionals who provide service for individuals with disabilities.

How Can the Funds be Used?

Anything that directly benefits the Beneficiary, including but not limited to:

- ✓ Health and Dental Procedures not covered by Medicare and Medicaid
- ✓ Adapted Vans or Vehicles
- ✓ Attorney and Guardian fees
- ✓ Maintenance of Homestead Property
- ✓ Hearing aids, Eyeglasses, or Clothing
- ✓ Travel and Entertainment
- ✓ Companionship and Caregiver Services
- ✓ Telephone, Computers or Electronics

Who Can Benefit?

Individuals with a disability who may also be:

- ✓ Medicaid Recipients
- ✓ Supplemental Security Income Recipients
- ✓ Applicants for Public Assistance Programs
- ✓ Current and Future Long Term Care Residents
- ✓ Inheritance Recipients

Third-Party Pooled SNT

The Third-Party Guardian Special Needs Pooled Trust Joinder Agreement (as well as other helpful information regarding our services) can be found on our website.



Our Services Include:

- ✓ Immediate Response to Distribution Requests
- ✓ Timely Accountings
- ✓ Direct Payments to Caregivers or to Third Parties
- ✓ Personalized Investment Strategy
- ✓ Insured and Professional Trustee
- ✓ Experience, Caring and Supportive Administrators
- ✓ Bilingual Administrative Services (Spanish and English)