

For a person with a disability surviving on their means-tested government benefits like **SSI** and **Medi-Cal**, receiving money from an inheritance or legal settlement can jeopardize their benefits and way of life. A **Special Needs Trust** can help.



Contact Us

Jewish Federation Goldsmith Center

6505 Wilshire Blvd, Suite 450

Los Angeles, CA 90048

310-773-9728

info@jlatrust.org

www.jlatrust.org

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We help **people**
with disabilities
protect their
benefits.



Why A Special Needs Trust?

People with disabilities are only able to receive most government benefits if they have very low monthly income and assets. These essential benefits, like SSI, IHSS, and Medi-Cal, have a \$2,000 cap (for singles) in countable resources. Going over this \$2,000 cap will result in reduced monthly checks or loss of benefits.

Maybe you're a person with a disability getting a legal settlement you deserve. Maybe you're a parent or grandparent who wants to make sure your family member is taken care of when you're gone. Or maybe you've set up a GoFundMe to help offset costs associated with a sudden disability.

The Jewish Los Angeles Special Needs Trust (JLA Trust) is a non-profit that provides Pooled Special Needs Trusts, which are a safe, legal, and affordable way to help people in all of these situations (and more!) save and keep money while preserving their essential benefits.



How It Works

- Potential clients talk with JLA Staff to determine if the fit is right. Enrolling clients sign a joinder and deposit their funds into a special needs trust investment account at Charles Schwab.
- We work with the beneficiary to develop a personalized spending plan that works for them. Most beneficiaries receive a regular monthly sum of "disbursed" money to pay for everyday expenses like transportation, clothes, hobbies, and more. You can contact your customer service rep for larger one-time expenses (computers, vacations, large medical expenses).
- All disbursements from the trust are overseen by a professional trustee.
- Legally, money from the trust can never be paid directly to the beneficiary.



About Us

JLA Trust helps people with disabilities achieve a high quality of life. We use available trust funds to help improve well-being and facilitate good budgeting decisions.

JLA Trust enrolled our first client in August 2016. Community need and support has allowed us to grow fast, doubling our client base every year.

Our roots in the Jewish community are strong, but we serve clients of all faiths, ethnicities, disability types, and sexual/gender identities.