

Contact Info

Our Trust Program team works with the Beneficiary, the family and Prairie Trust to ensure that the assets are utilized in the best interest of the individual with a disability.

Our Trust Program Staff



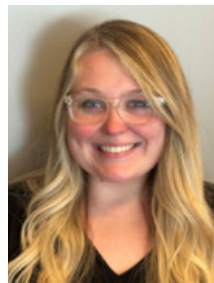
Mary Till
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Request a Free Consultation

Contact our Trust Program team at
414-774-6255 or [trust@lifnavigators.org](mailto:trust@lif navigators.org).

Visit Us

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LIFE NAVIGATORS
Your Disability Partner
EST. 1949



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Life Navigators Trust Program

Providing peace of mind
while protecting public benefits



The mission of Life Navigators is to improve the quality of life for individuals with disabilities and their families.

Why Choose a Life Navigators Trust

Trusted Community Partner for 75 Years

A Special Needs Trust is a legal entity that holds and manages assets for the benefit of an individual with a disability.



One of two major special needs trust programs in Wisconsin

Supporting over 480 trusts

Designed to supplement and preserve public benefits

Multiple affordable options for individuals and families



Prairie Trust, a local financial institution, serves as Trustee for all Life Navigators Trusts.

Types of Life Navigators Trusts

Providing Kim's Family with Peace of Mind



Kim's Trust I provides her family with peace of mind for her future needs. Her Trust will ensure she stays active and connected in our community.

Trust I — Community Trust (Third Party Trust)

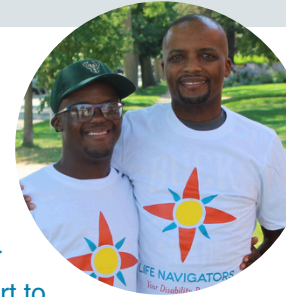
Set up by family or other third parties to benefit a loved one with a disability

Can be established in two ways:

Funded Trust—Funded through current assets for immediate use

Unfunded Trust—Created to receive assets in the future such as through a life insurance policy, retirement account, bequest or estate plan

Creating Opportunities for Cameron to Be Active



Cameron's dad appreciates our personal support to help his son utilize his Trust II. Cameron now enjoys more activities while protecting his public benefits.

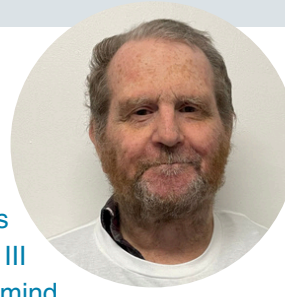
Trust II — Pooled Trust

Funded with assets that are entirely those of the beneficiary

Most often established when an individual with a disability has assets that would prevent them from receiving public benefits

Often funded with a SSI payback, personal injury settlement or benefits accrual

Supporting Richard to Be Safe, Happy and Healthy



As Richard gets older, his Trust III gives peace of mind that he will stay eligible for public benefits and remain safe and happy in his group home.

Trust III — Pooled Trust (Individuals 65 and Over)

Funded with assets that are entirely those of the beneficiary

Most often established when an individual with a disability has assets that would prevent them from receiving public benefits

Often funded with accrued assets, a personal injury settlement or benefits payback or accrual

Beneficiary Legal Fund Available

This fund is available to assist toward legal expenses (up to \$2,000) in setting up a funded Trust (with a balance at or below \$100,000)