

LIFE NAVIGATORS TRUST PROGRAM BENEFICIARY LEGAL FUND



Providing Multiple Trust Options

Due to a trusted partnership with families, attorneys, financial planners, and the community, Life Navigators created and received approval from Social Security Administration to operate its first Trust, Trust I – Third Party, in 1988. In 2011, Trust II – First Party Trust was approved to provide an additional planning tool for persons with disabilities and their families. In 2018, Life Navigators Developed Trust III designed for older adults over the age of 65. Currently, over 400 individuals have a Life Navigators Trust in place to ensure their needs will be met now and for their future. The program serves children, adults and older adults of all ages and offers a resource based on individualized needs with multiple Trust options.

Beneficiary Legal Fund

Under the leadership of our Board of Directors and Trust Committee, the program continues to grow, offering multiple trust options to support individuals with disabilities now and for their future.

We are pleased to announce we have created a Beneficiary Legal Fund. This new Beneficiary Legal Fund will ensure additional individuals with disabilities can plan for their service and financial needs. The Beneficiary Fund is available to cover the cost of legal fees to implement a Funded Trust I, II, or III with final assets at a minimum of \$2,000 and maximum of \$100,000. Each beneficiary can access up to \$2,000. The funds can be paid directly to the trust account or to the attorney drafting the trust. Please see the attached Beneficiary Fund Request Form. The form and all of our Trust Program documents will also be available on our website, LifeNavigators.org.

Contact Us for More Information

We welcome the opportunity to connect to share additional information on the Life Navigators Trust Program and the Beneficiary Legal Fund. If you have any questions or need further information, please contact Mary Till, Program Director, at (414) 988-7724 or mary@lifenavigators.org. Thank you in advance for positively impacting the children, adults with disabilities that we proudly serve.

Together we can expand programming and ensure individuals with disabilities have a financial plan in place to secure their future. Families will receive services and support to provide peace of mind for their loved one's future.

Life Navigators Trust Program is designed to ensure individuals with disabilities of all ages lead safe, happy lives in our community.

**LIFE NAVIGATORS TRUST PROGRAM
BENEFICIARY LEGAL FUND REQUEST**



Life Navigators Beneficiary Legal Fund is available to cover legal fees for individuals with disabilities to implement a Funded Life Navigators Trust I, II or III. Each Beneficiary can request up to \$2,000.

Approved funds can be disbursed directly to the Beneficiary Trust Account or to the Attorney drafting the Funded Trust. Payment will be disbursed once the Trust is approved by the Trustee (Prairie Trust) and the Trust Manager (Life Navigators).

Date of Request: _____

Beneficiary's Name: _____

Funded Trust Type:

Trust I – Community Trust Trust II – Pooled Trust Trust III – 65 and Older

Estimated Funded Trust Amount: \$ _____

(Please note: The Beneficiary Fund is available for Funded Trusts estimated at a minimum of \$2,000 and maximum of \$100,000)

Attorney/Law Firm: _____

Contact Information: _____

Beneficiary Fund Request Amount (Up to \$2,000): \$ _____

(Please include Attorney invoice or billing with request)

Fund Distribution to Beneficiary Trust Account

Fund Distribution payment to Attorney/Firm

For questions or additional information on the Beneficiary Legal Fund, please contact Mary Till at (414) 774-6255 or [mary@lifnavigators.org](mailto:mary@lif navigators.org).