

This Presentation Offers Information on Life Navigators Trust Options

Large and Small — Affordable for Individuals and Families



Trust I — Community Trust
(Third Party Trust for
Futures Planning)



Trust II—Pooled Trust
(Funded Entirely with
Beneficiary's Assets)



Trust III—Pooled Trust
(Funded Entirely with
Beneficiary's Assets
for Age 65 and Over)

The Life Navigators Special Needs Trust Program is designed to promote comfort and happiness and protect and preserve benefit programs for individuals with disabilities.

Developing a plan for the financial and service needs of individuals with disabilities is critical to Life Navigators' mission. A Special Needs Trust as part of an overall financial plan provides a lifetime of security and protection and provides families peace of mind that their loved one with a disability will enjoy the highest possible quality of life.



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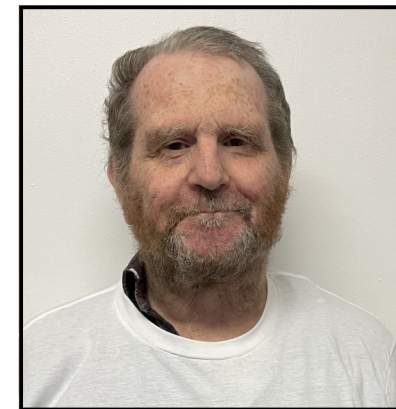
Your Disability Partner

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Special Needs Trusts — Large and Small A Key for Your Future



Life Navigators Trust Presentation
Tuesday, June 24, 2025
8:30 am — 11:30 am

Our Presenters



Nancy K. Schoenberg, VP - Senior Trust Administrator
Prairie Trust, A Division of Waukesha State Bank

Nancy joined Prairie Trust in December 2013 and is responsible for the administration of trusts, estates, and employee benefits plans. Prior to joining Prairie Trust, Nancy worked at Talmer Bank f/k/a First Banking Center in Burlington for thirteen years. While there, she supervised trust operations and administered trusts and employee benefits plans. She received her Bachelors of Business Administration in Finance from UW Whitewater in 1991. She also earned her Retirement Services Professional Certification and completed Trust I from Cannon Financial Institute in 2002.



Mary Till, Associate Director
Life Navigators

Mary has been with Life Navigators for over 20 years and has worked in a variety of programs that support kids and adults with disabilities and their families. Mary currently manages the Trust Program and oversees numerous programs supporting kids and adults with disabilities and their families including Corporate Guardianship, Information & Assistance, Family Support and Self-Advocacy & Independence. Mary received her Bachelors in Social Work from Marquette University in 1993.



Amy Devine, Attorney at Law
Haskins Short & Brindley LLC

Amy is an attorney committed to helping individuals and families navigate difficult decisions and plan for the future. Amy received her B.A. from UW Madison and her J.D. from the City University of NY School of Law. She earned a Master's in Social Work and Certificate in Applied Gerontology from UW Milwaukee. She has worked as the public policy coordinator and lobbyist for Disability Rights WI. Amy has taught as an adjunct professor at UW Law School and is on the Board for New Bridge Madison. She also volunteers with the Dane County Basic Estate Planning Clinic.



Vicki Wachniak, Executive Director
Life Navigators

Vicki has been with Life Navigators since 1998, serving as the Executive Director for 21 of those years. Under her leadership, Life Navigators has expanded its programs to address the needs of kids and adults with disabilities and their families. Vicki works closely with the Board of Directors to set the strategic direction for the organization and provide programming that ensures safe, happy, and healthy lives. Vicki participates in numerous community committees and coalitions that address service needs for individuals and families with disabilities.

Do you have a client or a loved one who could benefit from a special needs trust?

Do you have questions about how public benefits and special needs trusts work together?

The Life Navigators Trust Program offers multiple trust options to meet each beneficiary's individualized needs both now and in the future.

Life Navigators is one of two special needs trust programs in the state of Wisconsin.

Join our panel of experts to learn more about special needs trusts and why they are right for your client or family member.

Tuesday, June 24, 2025

8:30 am — 9:00 am Registration & Continental Breakfast

9:00 am — 11:30 am Program

Wisconsin Bankers Association

4721 S Biltmore Ln

Madison, WI 53718

There is no cost to attend. Seating is limited.
RSVP by June 17 to Emma at 414-774-6255
or emma@lifenavigators.org.

Presentation is for attorneys, estate planners, financial advisors, disability professionals and families.



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