

# SPECIAL NEEDS SCHOOL

## Curriculum

### Planning

Who Can Benefit From a Special Needs Trust  
Providing For a Person's Supplemental Needs

### Trust

Creating A Special Needs Trust  
How the Trust Works--Nuts and Bolts  
Key Points of the Special Needs Trust  
Choosing Your Trustee(s)  
Overview of Pooled Trusts  
Asset Distribution Options (various types of trusts)  
Adding the Special Needs Trust to a Will or Living Trust  
Alternatives to a Special Needs Trust

### Funding

Identify Resources to Fund the Plan

### Special Needs Trust Administration

How Trust Funds Can (and CANNOT) Be Used  
Taxation  
Termination

### Resources/ Benefits

Government Entitlements  
Maximizing and Protecting Public & Private Resources

### The Letter of Intent

### Guardianship & Conservatorship

### Housing

### Work

### Medical Expenses

### Transportation

### IEPs (Individual Education Plans)

IDEA

Cannon has over forty years of practical financial and trust training experience which enables us to offer the Special Needs School, training advisors to educate and guide families through the planning process, ultimately providing them with peace of mind. In addition, William Parker, founder of the Institute of Special Needs Planning, is recognized nationally as a top expert in the area of special needs planning. As the father of three special needs children, he has been down this path himself. Not only does he have technical expertise, but he is also an advocate at the state and federal levels for individuals with special needs.

Over the past 5 years in the United States, the increase in neurodevelopmental disorders has been staggering. In fact, according to the Autism Society of America, autism is reportedly the fastest growing developmental disability, increasing at an alarming rate of 10 – 17% annually. As estimated 3 – 8% of the 4 million children born each year are affected with a neurodevelopmental disorder. This marketplace is historically one of the most underserved and misunderstood populations until now. This course was created to give advisors a deeper understanding of the maze of government benefits and how they effect individual families, and equip the advisor with the tools to guide families through the ever changing special needs landscape.

## Who Should Attend

- Financial Planners & Consultants
- Financial Advisors
- Wealth Management Advisors
- Personal Trust Administrative Officers
- Trust Business Development Officers
- Personal Trust Managers
- Trust Audit/Compliance Officers
- Professional Fiduciaries
- Attorneys and Paralegals
- Accountants
- Insurance Professionals
- Estate Planners
- Life Planners

## Class Schedule

Registration and orientation take place on Monday afternoon and class begins on Tuesday at 8:00 AM. Session closes on Thursday at 1:00 PM. The two and a half day session closes following a comprehensive exam.

## Key Benefits

- Participants return to their institutions with practical information and skills immediately applicable to help advise the special needs community
- Participants acquire a solid foundation in special needs planning
- Participants become part of a network with other students and members that will benefit them for years to come
- Enhance the participant's professionalism by acquiring the CSNP designation
- Potential clients would visit website (CSNP) and the website will drive them to an advisor in the appropriate area

## COURSES



## LOCATIONS



Myrtle Beach, SC

REGISTER

COURSES

## Faculty

### Fran M. DeMaris

Executive Vice President  
Cannon Financial Institute  
Champaign, IL

### William J. Parker

CEO & President  
Institute of Special Needs Planning  
Harrisburg, PA

### Elizabeth S. Johnides

Vice President  
Institute of Special Needs Planning  
Harrisburg, PA