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March 2026 Special Needs News

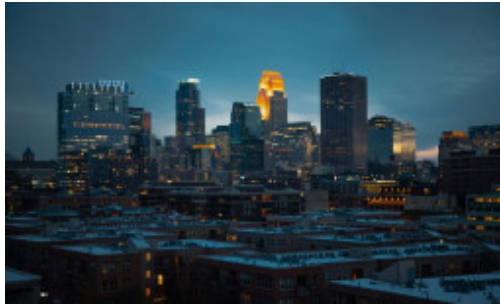
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QUESTION OF THE MONTH:

Q: I am the trustee of a first party Special Needs trust when my son inherited monies outright from his great aunt. When he passes can I (or my successor) purchase a prepaid funeral before Medicaid is paid?

A: As the trustee of a first-party Special Needs Trust (SNT), you can purchase a prepaid funeral for your son, but it **must be done while he is still alive.**

Once the beneficiary of a first-party SNT passes away, federal law requires that the state Medicaid agency be reimbursed for all medical assistance paid during the beneficiary's lifetime **before** any other expenses, including funeral costs, can be paid from the remaining trust funds.



Best Cities to Live in for People With Disabilities

The best cities for people with disabilities to live in, according to a WalletHub analysis of 182 U.S. cities, score highest on a combination of quality of life, health care, and economy factors.

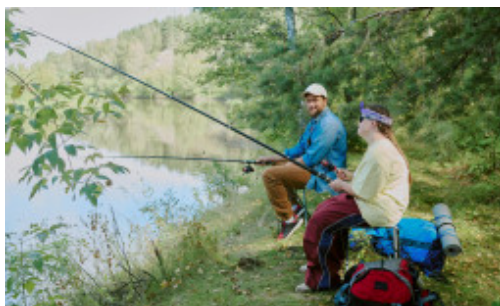
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How to Prepare to Apply for Social Security Disability

In 2024, the Social Security Administration rejected more than half of initial disability benefits applications. Preparing to apply for disability benefits can be crucial to successfully securing benefits.

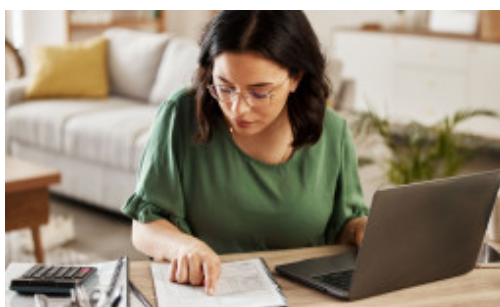
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End-of-Life Care Planning for Individuals With Special Needs

Discussing end-of-life care with a loved one who has an intellectual or developmental disability is about honoring who they are, what matters to them, and how they want to live.

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Helpful Tax Filing Tips for People With Disabilities

Filing taxes can be time-consuming and complicated, but there are some available resources, benefits, and tax credits that can help individuals with disabilities lower their tax liability and boost their savings.

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