

PLAN of Connecticut



Is the PLAN of CT Pooled Trust right for me?

The State of CT permits people with disabilities to place excess monthly income or assets into a Pooled (D4c) Trust to qualify for the Medicaid Home Care Assistance Waiver.

According to Federal Law OBRA 93, a Pooled Trust must be managed by a non-profit organization. PLAN of CT is the only non-profit in CT that manages a Pooled Trust.

- ➔ Are you...**
Looking to remain in your home or return to your community after time in a rehabilitation center or hospital?
 - ➔ Do you...**
Require more home care services than you can afford out of pocket?
 - ➔ Have you...**
Been told you are over income or assets to currently qualify for Medicaid or a Medicaid waiver program?
- 1** The PLAN of CT Pooled Trust establishment fee is \$1050.00. PLAN also requires \$300 be held in the account at all times for closing fees; this can be saved over time.
 - 2** Monthly maintenance fees are approximately \$75-\$125/month which is billed directly to the trust quarterly. Funds available after the monthly maintenance fee can be distributed for the benefit of the client through rent, supplemental health care needs, furniture purchases, taxes etc. Distributions will be made payable to vendors only as cash is not provided. Please see fee schedule for details.
 - 3** PLAN of CT requires the assistance of an attorney to establish the trust. This will be an additional cost payable to your attorney. A list of our member attorneys can be found on www.planofct.org.
 - 4** Upon death, no further disbursements can be made for the beneficiary from the trust including funeral expenses or outstanding debts. According to federal law, all remaining funds must either paid back to the state(s) for Medicaid services provided or held in the Charitable Trust, a fund to help disabled CT residents, administered by PLAN of CT.

If you answered yes to any of the questions above, a Pooled Trust might be right for you.
Contact PLAN of CT to learn more

Planned Lifetime Assistance Network of Connecticut, Inc.

P.O. Box 290937, Wethersfield, CT 06129

{P} 860-523-4951 {F} 860-523-0267 info@planofct.org