

**ESSENTIAL INFORMATION FOR THOSE WHO WILL BE CALLED UPON  
TO HANDLE A TRUST FOR A PERSON WITH A DISABILITY. . .**

**HOW TO ADMINISTER A SPECIAL NEEDS TRUST**

A seminar for Parents, Trustees and Successor Trustees of  
Special Needs Trusts and OBRA '93 Trusts



**SPAIN, SPAIN & VARNET P.C.**

33 N. Dearborn, Suite 2220  
Chicago, IL 60602  
**www.ssvlegal.com**

*Presented by:* Theresa M. Varnet, J.D., M.S.W.  
Richard C. Spain, J.D., LL.M. - Tax  
Nancy M. Spain, J.D.  
Jayme Levin-Muriel, J.D.

**Saturday, April 27, 2019**

**Hilton DoubleTree Lisle / Naperville**

*(same place, new name)*

**9:00 a.m. to 1:00 p.m.**

**3003 Corporate West Drive, Lisle, IL 60532  
630-505-0900**

***DIRECTIONS***

- From O'Hare Airport: 294 South to 88 West. Exit IL-53 and turn left. After 0.2 miles, turn right onto Warrenville Road. After 1.8 miles, turn left onto Corporate West.
- From Midway Airport: I-55 South to 355 North. Take 355 North to I-88 West and exit at IL-53. Turn left onto IL 53. After 0.2 miles, turn right onto Warrenville Road. After 1.8 miles, turn left onto Corporate West.
- From Chicago: 290 West to I-88 West, exit at IL-53. Turn left onto IL 53. After 0.2 miles, turn right onto Warrenville Road. After 1.8 miles, turn left onto Corporate West..

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**PROGRAM AGENDA**

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|------------|---|
| 8:30 a.m.  | Continental Breakfast and Registration  |
| 9:00       | Introduction and Overview   |
| 9:10       | Trustee Basics: Types of SNTs and when to use each type   |
| 9:40       | Beneficiary Designations/Funding 3 <sup>rd</sup> and 1 <sup>st</sup> party SNTs   |
| 9:55       | Guardianship and Alternatives to Guardianship   |
| 10:10      | Government Benefits Overview and Update/Review Legislation  |
| 11:00      | Break   |
| 11:15      | Estate Tax Update: Tax laws as they relate to special needs planning<br>Brief overview of Income Tax requirements and IRA rules |
| 12:15      | Administrative Challenges and Selecting an Attorney   |
| 12:30 p.m. | Questions   |

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Return Service Requested

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630-505-0900

Registration Fee: \$70 per person

<i>If you have any questions, please contact:</i> Beth Zinanni 312-220-9112 x207 312-220-9261 (fax) <a href="mailto:ezinanni@ssvlegal.com">ezinanni@ssvlegal.com</a>	<i>For hotel reservations:</i> Please call the hotel at 630-505-0900 and mention that you are staying for our seminar
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**\*\*REGISTER ONLINE BY VISITING OUR WEBSITE AND CLICKING THE LINK UNDER THE 'SEMINAR' TAB\*\***

**REGISTRATION** – April 27, 2019 seminar

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ zip: \_\_\_\_\_

phone: \_\_\_\_\_ General Registration: \$70/person  
e-mail: \_\_\_\_\_ \_\_\_\_\_ attendees @ \$70 \$ \_\_\_\_\_

**Please list all attendees and mail with registration.** **TOTAL\*** \$ \_\_\_\_\_

*Make checks payable to*

*and send registration by April 12 to:* Spain, Spain & Varnet P.C.  
33 N. Dearborn #2220  
Chicago, IL 60602

\*No refunds for cancellations after April 15, 2019. Cancellations prior to April 15, 2019 are entitled to a refund less a \$25 administrative fee.