

In this issue

- Manager's Message
- Exciting news at The Arc Oregon
- Investment Performance Report
- Updates on ABLE and Online Access
- Planning Ahead – Trips and Funeral Planning
- Q & A

Manager's Message

After a seemingly endless winter, it appears that spring has finally arrived. For many, it is a season for cleaning, but for The Arc Oregon, it means REMODELING. Yes, we are restructuring our office space!

Construction began on Monday, April 16th and it will be wrapping up on June 5th. We are creating a new reception area to welcome our visitors and new office spaces to accommodate our new programs and staff (see article below). Although we are not working in our office at Front Street during the remodel process, we are collecting mail on a daily basis and we have a secure box outside the door of our office where you can drop off forms/receipts should you happen to stop by. We look forward to the work being completed and returning in early June.

On April 27th-28th, The Arc Oregon held our Annual Business Meeting and Leadership Conference. Local chapter presidents and executive directors convened for two days of learning, networking, and planning. We look forward to collaborating and working together to strengthen our presence throughout the state over the next year.

By now, many of you have had the opportunity to speak with Susan and/or Jessica. Aren't they great?! I am very happy to have them as a part of the OSNT team and, more broadly, as excellent support for all of our programs at The Arc Oregon. We are dividing duties and assigning tasks to each of them. We thank you for your patience as we work to define our roles to provide the best service possible for you.



Cici Gaynor
OSNT Program Manager

Cici

Stay informed

Stay informed about all of the great things happening at the OSNT and at The Arc Oregon by signing up for our email newsletters.

Visit our website at TheArcOregon.org and click the **Stay In Touch** box to join our list.



WE HAVE MERGED!

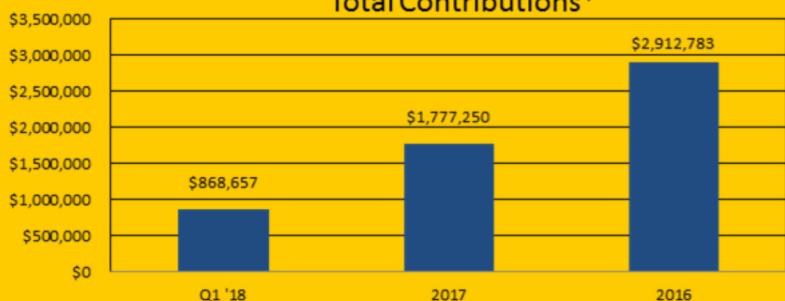


We are very excited to announce that Oregon Training and Consultation (OTAC) has become a program of The Arc Oregon as of April 1, 2018. OTAC, a non-profit organization, has been providing training and mentorship services focused on person-centered practices and positive behavior supports for over 30 years. As a program of The Arc Oregon, OTAC is looking forward to expanding its services and bringing a new level of support to members and local chapters of The Arc throughout Oregon.

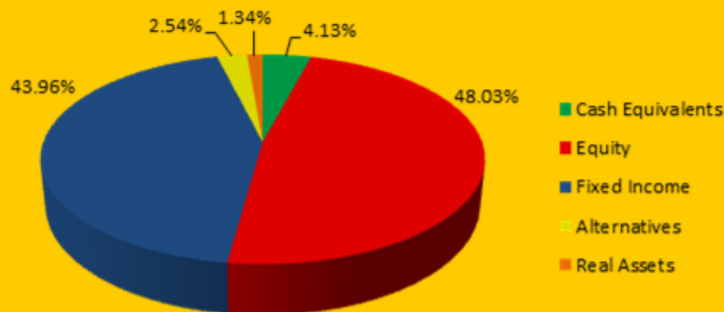
For more information about OTAC, visit their website at OTAC.org.

The Boards and staff of both organizations worked very hard for months to facilitate the joining of these two organizations. With this change, The Arc Oregon is more than doubling the size of our organization. We look forward to combining our resources and talents to build a stronger organization in pursuit of our shared mission, vision, and values.

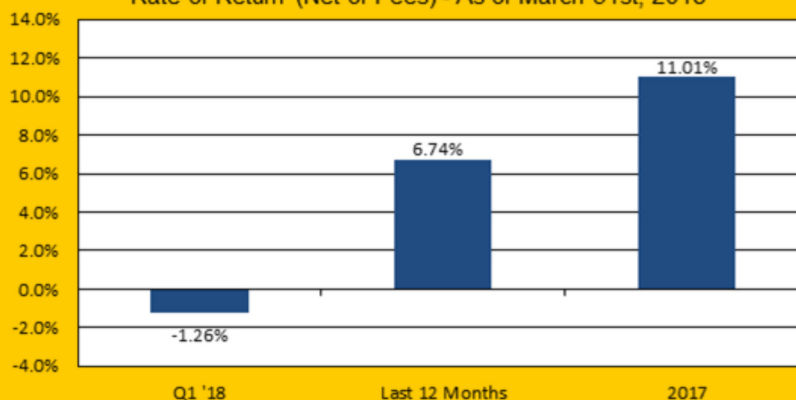
Total Contributions*



* Includes income to principal transfers



Rate of Return (Net of Fees) - As of March 31st, 2018



Returns shown are net of investment management fees. Information provided is obtained from sources deemed to be reliable, but KeyBank National Association and its affiliated companies, together referred herein as KeyBank, do not guarantee the accuracy, completeness, or timeliness of the information or make any warranties with regard to the results to be obtained from its use. KeyBank shall not be liable for any claims or losses of any nature, including, but not limited to, lost profits, punitive or consequential damages. This material is for informational purposes only. Past performance is no guarantee of future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted.

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Updates

ABLE Accounts

We understand that there has been a lot of excitement and anticipation surrounding ABLE accounts and the possibility of transferring funds from Special Needs Trusts to an ABLE account.

While there has been language added to the Social Security Program Operations Manual System (POMS), it is under the title of Resource Exclusions regarding SSI. Unfortunately, there has not yet been direction given in regard to Pooled Trusts and what implications there may be for transferring from a Pooled Special Needs Trust to ABLE accounts.

Until there is policy direction written into the Pooled Trusts section of the POMS, our Board has determined that transfers will not be available. We will continue to monitor the situation and inform you as soon as there is a change.

Online Account Access

We are happy to report that we have a new firewall in place that will allow us to better secure our network and provide more financial privacy and safety that is so important to us.

Once we make the move back into our office after construction, we will reopen our online portal. After that, we will send email notifications to all of those who are authorized to access account balances online and provide instructions for how to access the portal.

As always, if you need an account statement prior to gaining online account access, please do not hesitate to contact our office and we would be happy to provide you with one. We sincerely apologize for any inconvenience this has caused.

TRAVEL PLANNING

As we approach the summer months, many of our beneficiaries look forward to planning fun outdoor activities and vacations, seeing the sights and visiting friends and family. As you know, planning can sometimes be a challenging event, especially when you are trying to figure out how to use a trust account to pay for the trip. Here are some tips that we hope are helpful:



- 1) Plan your trip in **at least 60 days in advance** of your departure date so that you can submit your disbursement request well in advance.
- 2) Call our office for assistance with making arrangements or to ask questions about funds for expenses **prior to finalizing plans**.
- 3) Use the **Travel Disbursement Request Form** to determine what costs will be involved and submit it to our office.

Be advised...

- Cash CANNOT be disbursed for spending money (to any individual, but especially to the beneficiary).
- Friends, family, or providers must provide ALL receipts when submitting a request for reimbursement.
- Travel costs MAY be approved for a companion with appropriate documentation, but not necessarily for time.
- Detailed invoices must be provided for all-inclusive and group trips.

PRE-PAID FUNERAL PLANS

While it is not always an easy topic to bring up, we have had many families contact us to ask that we pay for funeral costs when a loved one who has a sub-trust account within the pooled trust passes away. Unfortunately, due to state and federal laws, first-party trust accounts are not allowed to pay for funeral expenses after the death of a beneficiary. There may be exceptions when considering third-party sub-trust accounts, but we encourage all of our sub-account holders to use funds to make such arrangements before they are needed.

The State of Oregon DOES allow for payment to be issued for prepaid funeral plans by paying into a Funeral Trust Fund through a provider certified by the state. The list of Oregon certified providers can be found online at: www.oregon.gov/mortcem/Pages/index.aspx

Once the plans have been arranged with your chosen provider, you may submit a disbursement request form and instruct the provider to send a copy of the contract to the OSNT. We will review and process the disbursement and mail the check to the funeral home. You and your family will then have the peace of mind knowing that this expense will be taken care of and will not be a burden in the future.

As always, please feel free to contact our office if you have any questions or if we can help in any way. Our team would be happy to assist you in coordinating with a provider in your area.

Planning Ahead

Contact us

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Questions & Answers

Q When I call a local Key Bank, why can't they answer questions about my account?

A Any and all calls regarding your account should always be directed to our office. The funds for the Oregon Special Needs Trust are not held in your local branch and therefore, staff at that branch will not be able to assist you. We keep records for each participant's account and are always happy to discuss your questions or concerns.

Q Why can't you pay my credit card bill with just my statement?

A We require that receipts be submitted with the statement and disbursement request form so that we are able to verify what was purchased. No payment will be made for any items related to food, shelter or other items covered by other public benefit programs. PLEASE NOTE: The credit card statement date must be current. Old charges may be considered for payment on a case-by-case basis.

Q Why can't I get reimbursement from my own trust account?

A Currently, any money paid directly to a beneficiary (account holder) is deemed to be unearned income by government agencies. Our policies prevent us from issuing any disbursement that may adversely affect your public benefits. Since additional income could potentially affect your benefits, we cannot pay you directly under any circumstances.

Do you have a question or topic that you want us to answer in our next newsletter? Please send your question to cgaynor@thearcoregon.org.

If you would like to schedule a presentation, ISP participation, or a training session on how to fill out disbursement paperwork, call our office today!