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## Director's Message

Hello Everyone and Happy Summer!

It truly seems that summer has finally arrived and hopefully you are able to enjoy some fun activities and stay safe and healthy while doing so.

Even though our office remains closed to the public, we continue to answer calls/emails, process mail for disbursement requests, deposits, new accounts, and set up video meetings when requested.

We, as an organization, are aware that this is a very complicated time in our world. Please visit our website at [TheArcOregon.org](http://TheArcOregon.org) to review information on Covid-19 resources, Black Lives Matter, voting resources and other important topics.

Until next time, take care and be well!



**Cici Gaynor**  
OSNT Program Director

*Cici*



OREGON SPECIAL NEEDS  
**TRUST**

[OregonSNT.org](http://OregonSNT.org)

## Stay informed

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

Go to [OregonSNT.org](http://OregonSNT.org), hover over Resources and select Newsletters.

For The Arc Oregon, visit our website at [TheArcOregon.org](http://TheArcOregon.org) and click the **Stay In Touch** box to join our list.

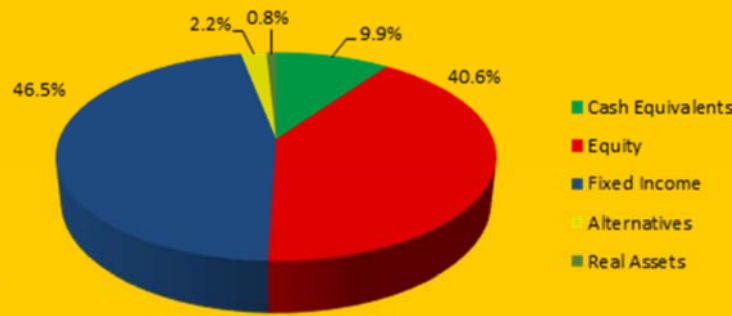
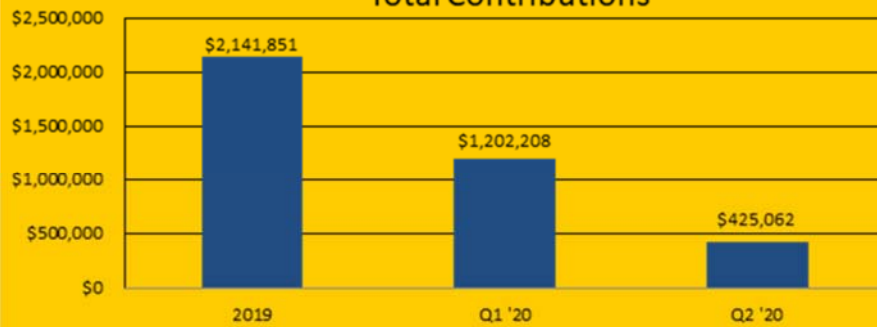


**REMINDER:** The OSNT has its own dedicated website!

If you haven't visited, go to [www.OregonSNT.org](http://www.OregonSNT.org) for all of your trust-related needs. What can you do at the website?

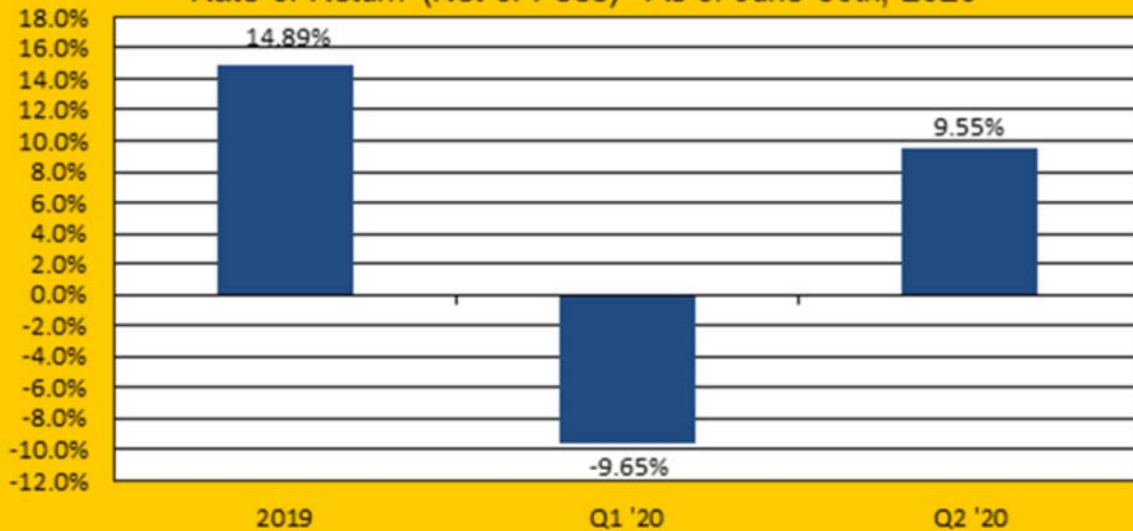
- **View Your Account:** Click on "Account Login" to view your account balance, or print a range of dates if needed for recertification of benefits.
- **Submit a Disbursement Request:** Click on "Request Distribution" to request a one-time or recurring disbursement.
- **Find Resources:** Click on "Resources" to view FAQs, past Newsletters, information about ABLÉ accounts, Links to other resources, and a Glossary of terms.
- **Find Forms:** Click on "Forms" to find a variety of downloadable/printable documents.

Total Contributions\*



\* Includes income to principal transfers

Rate of Return (Net of Fees) - As of June 30th, 2020



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.

Investment products are: NOT FDIC INSURED • NOT BANK GUARANTEED • MAY LOSE VALUE • NOT A DEPOSIT  
NOT INSURED BY ANY FEDERAL OR STATE GOVERNMENT AGENCY

# Remainder Fund Grants

Over the last fiscal year, we have approved over **\$14,000.00** for the following grants:

- Two (2) Legal Expense Grants - This grant is open to prospective first-party sub-account beneficiaries to pay for the legal fees incurred to get a court-approval as necessary to establish an OSNT account. To be eligible for this grant award, the total expected deposit into the sub-account must be less than \$15,000, and the beneficiary must be ineligible for or unable to establish an ABLE Account. The maximum Legal Expense Grant award is \$2,500.
- One (1) Final Expense Grant - This grant is available to pay for final burial/cremation expenses for a current or previous OSNT sub-account beneficiary who has passed away. This grant may be applied for by a family member of the beneficiary in the event the beneficiary does not have a pre-paid plan in place and the family would experience undue hardship without financial assistance. The maximum Final Expense Grant award is \$1,500.
- Four (4) Accessibility Grants - This grant is open to any person with a disability for home or vehicle modifications, adaptive equipment or technology, communication devices or durable medical equipment needed to increase accessibility at home, work, school or in their community. The maximum Accessibility Grant award is \$2,000.
- Zero (0) Convention/Conference Grants - This grant is available to people with I/DD and their families to help cover the cost(s) of registration fees and/or travel expenses to attend The Arc Oregon State Convention, The Arc National Convention, the National Disability Policy Seminar, or an Oregon conference or convention with a focus on supporting and advancing the rights of people with I/DD. The maximum Convention/Conference Grant award is \$1,000.

These grants are possible because the OSNT retains 50% of funds remaining in **first-party** accounts when the trust beneficiary passes away. Our goal is to use those funds to support the needs and enhance the quality of life for people with disabilities.

Visit our webpage for more information: [OregonSNT.org/grant-program/](http://OregonSNT.org/grant-program/)

## Join the Online Community

*We are just getting started and we need your help!*

As a member of The Arc Oregon community you will be connected to a wide network of people across Oregon who share your interests, values, and experiences.

With access to our online community you can join private and public groups, meet new people, access documents and resources, share your ideas on a variety of topics, and stay informed about what's happening in the developmental disability community here in Oregon and around the country.

We hope you will join us (it's FREE!) and help us build a vibrant and engaging community where you can be seen, heard, and counted!

Sign up at: [thearcoregon.org/register/](http://thearcoregon.org/register/)



## Contact us

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Salem, OR 97301

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## Questions & Answers

- Q** Can I use funds from my trust for my friend/spouse/significant other/child/favorite charity?
- A** Unfortunately, no, you cannot. The funds for your sub-account are to be used only for your sole benefit. We know that it is enjoyable to give gifts to others, but rules for a special needs trust state that the funds are to be used for you. If you would like to discuss ways that the OSNT might be able to help with other expenses to free up funds for you, please contact us.
- Q** I am going on vacation soon, can I get spending cash from the trust?
- A** No. Because cash and cash equivalents, like gift cards, are not an allowable expense from the trust. We are happy to work with you to find other bills that the trust can pay for you so that you have more personal spending money from your own funds.
- Q** When I call a local Key Bank, why can't they answer questions about my account?
- A** The funds for the OSNT are not held in your local branch and therefore, staff at that branch will not be able to assist you. Any and all calls regarding your account should be directed to our office. We are happy to help!

*If you have a question or topic for the Fall newsletter, please email [cgaynor@thearcoregon.org](mailto:cgaynor@thearcoregon.org)*