



Interim, Inc.

Housing • Healing • Hope

Resource List - Special Needs Trusts, Fiduciaries, and ABLÉ Accounts

Interim, Inc. Special Need Trust Webinar 03/28:

<https://youtu.be/4-9HWCK-6aM>

Interim:

For questions about Interim, Inc or our services, call us at (831) 649-4522 or visit our website at www.interiminc.org.

What are Special Needs Trusts:

<https://www.dhcs.ca.gov/services/Pages/Special-Needs-Trust.aspx>

Resources on Special Needs Trusts:

A wide variety of resources and referral information about special needs trusts are available on the Special Needs Alliance Website. <https://www.specialneedsalliance.org>

Resources on ABLÉ (Achieving a Better Life Experience Act) Accounts:

A wide variety of resources and referral information about ABLÉ Accounts are available on the ABLÉ National Resource Center Website. <https://www.ablenrc.org/>

Fiduciaries:

Professional Fiduciaries Association of California: <https://pfac-pro.org/>

California Department of Consumer Affairs Professional Fiduciaries Bureau:

<https://www.fiduciary.ca.gov/>

Professional Fiduciaries Bureau Screening Tool: WHAT YOU SHOULD KNOW BEFORE HIRING A PROFESSIONAL FIDUCIARY - https://www.fiduciary.ca.gov/forms_pubs/hire_fiduciary.pdf

Professional Fiduciaries Bureau: License Verification - <https://search.dca.ca.gov/>



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Speaker Resources:

Stephen Dale

Stephen Dale <https://dalelawfirm.com/>; ARC <https://thearc.org/>; Golden State Pooled Trust <https://www.gspt.org/>; Special Needs Alliance <https://www.specialneedsalliance.org>

Additional Resources from Stephen Dale:

Stephen Dale maintains an active YouTube Channel with a wide variety of videos and webinars about Special Needs Trusts and ABLE Accounts, among other topics:

<https://www.youtube.com/user/SntGrandPoohbah>

Recent Content Additions Relevant to the Webinar on 03/28:

Housing Issues and Special Needs Trusts -

https://www.youtube.com/watch?v=pDAPP8jDuCg&list=PL5dEwlCC642oh1uQMbr0mMnaj_vhAn4ak

Private Fiduciary Best Practices: <https://www.youtube.com/watch?v=xK5f5gZUPyM>

Yvonne Ascher

<https://www.yvonneascher.com/>; <https://www.nheh.com/attorneys/yvonne-a-ascher.html>;
American College of Estate & Trust Counsel (ACTEC) <https://www.actec.org/>

Fiona McDonough -

Fiona McDonough <https://www.trusteeusa.com/>; **Monterey Bay Chapter of Professional Fiduciary Association of California** <https://pfac-pro.org/about/regional-leadership/>