

# PROGRAMME

- **SPECIAL CARE TRUSTS, CHARITABLE GIVING UPDATE**

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# What is the special care trust?

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- History
- Who it's for
- How it works



# The JCF Special Care Trust

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Parents of disabled adult children

- Who it's for
- The contract
- The Trust
  - Beneficiary
  - Trustee(s)
  - Budget considerations
  - What expenses might be covered



# Parents of disabled adult children (cont'd)

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- The Will
- Sample will clause

***Trust in favour of my child:***

*Should my spouse predecease me, I hereby bequeath the residue of all my property, movable and immovable, to be transferred to an autonomous and distinct trust patrimony which I am constituting under the terms of the present legacy, to be appropriated to the benefit of my child*

***Examples of Ways the Income can be used:***

*Maintenance, upkeep, education, medical needs as well as to pay any other expenses of any nature whatsoever effected for the benefit of my child*



# The JCF Special Care Trust

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Seniors living alone

- Who it's for
- The mandate
- The trust
  - Beneficiary
  - Trustees
- The contract

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**Question:** What happens on death of the senior and adult child?



# Agence Ometz Care packages

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Community Living Support Packages include:

- Regular home visits
- Regular telephone contact
- Services of a professional case manager
- Access to a wide variety of group services
- Activities programmes



# Checklist

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- Housing
- Food
- Budgeting/Bills
- Transportation
- Self Care



## checklist (cont'd)

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- Housekeeping
- Social contact/activities
- Holidays
- Birthdays





## checklist (cont'd)

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- Healthcare maintenance
- Vocational training
- General advocacy
- Contact and support



# Support Services for the Elderly CJCS

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- Services provided
- Requirements
  - Prearranged, prepaid funeral
  - Copy of mandate, including medical directives
  - Evidence of competency



# Other considerations

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- Fees
- Role of the family
- Risk factors
  - Family problems
  - What happens if the money runs out?