

DayOne Reliance, Inc.  
"Securing Your Future"  
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*"Securing Your Future"*

# FACT SHEET

DayOne Reliance, Incorporated is a not-for-profit organization that provides assistance to families in planning a secure future for their family member, sibling, child or aging parent with a disability without jeopardizing their government benefits or entitlements.

There are several options for meeting the supplemental service needs of people with disabilities without jeopardizing state and federal benefits or entitlements:

▶ **Third Party Individual Trust or Third Party Pooled Trust (statewide Pooled)**

These trusts are available to families of individuals with disabilities to utilize family assets to supplement current state and federal benefits by providing additional services without jeopardizing benefits or entitlements.

▶ **Self Settled Individual Trust or Self Settled Pooled Payback Trust**

These trusts are available to families of individuals with disabilities to permit them to use assets of the individual or the individual's spouse to supplement services while maintaining or becoming eligible for state and federal benefits or entitlements. Funds remaining in this Trust at the death of an individual that are not retained by Trust, will be paid to the State up to an amount equal to the total medical assistance paid on behalf of the individual.

▶ **Tandem Trust**

This trust combines the family's ability to benefit from both the Self Settled and Third Party Pooled Trusts while privately holding and controlling their own supplemental needs trusts.

▶ **Unfunded Trust**

This option allows a family to establish a trust without immediate funding.

▶ **Personalized Case Management**

The staff at DayOne Reliance, Inc. will assist individuals and their families in navigating through the process of setting up a trust. Case management services are provided based on the needs of each participant and their families, recognizing each participant is unique.

▶ **Professional oversight of all expenditures.**

The goal of each of these Trusts is to enhance the quality of life for the individual by providing a financing mechanism which operates through individualized Care Plans to arrange for supplemental services. To learn more about trust options or to make an appointment, please contact **Bonnie McCrary, Trust Administrator at (630) 208-5555.**