

## Referencing Your Special Needs Trust

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### 1. Writing Checks to Fund a Special Needs Trust:

To add funds to an already established Special Needs Trust sub account, write checks as follows:

- Make check payable to: **Foundation of The Arc of Northern Virginia**
- In check's memo section write: **[FF/SF] SNT fbo [Beneficiary's full name]**

[print *either* "FF" *or* "SF" for Family-Funded or Self-Funded and print the Beneficiary's full name after 'fbo' which is the abbreviated for the benefit of.]

### 2. Naming the Special Needs Trust in Estate Planning Documents:

Review beneficiary designations.

Include the following phrase in your will or other estate documents to name the Special Needs Trust as a beneficiary:

**Key Bank, N.A., its successors and assigns, as Trustee of The Foundation of The Arc of Northern Virginia Personal Support Family-Funded Trust for the benefit of [Beneficiary's full name].**

### 3. Naming the Special Needs Trust in Insurance Policies

Review beneficiary designations.

When naming the trust as beneficiary of a life insurance policy, include the following phrase as a beneficiary:

**Foundation of The Arc of Northern Virginia Personal Support Family-Funded Trust for the benefit of [Beneficiary's full name].**

### 4. Decanting:

It is sometimes possible to terminate one trust and pour the assets over to another trust. If a person is beneficiary of a private family-funded trust and wishes to move it to the Personal Support Special Needs Trust at The Arc of Northern Virginia, that may be possible through a process called "decanting". This requires the advice of an attorney and preparation of a decanting agreement. If it is determined that decanting is possible, then a joinder agreement will be prepared with the Personal Support Special Needs Trust, following the same terms as were contained in the private family-funded trust.

**Please note:** Decanting is permitted in Virginia but not in Maryland or the District of Columbia.