



Supporting and empowering individuals with disabilities and their families through Education, Outreach, Networking, and Future Planning Services.



**FEBRUARY 2018**

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**Changes to the ABLÉ Savings Program**  
Olivia Stewart, ACHIEVA Family Trust Legal Intern

The ABLÉ Savings Program is a federal program that provides individuals with qualifying disabilities a tax-free way to save for disability-related expenses without impacting their government benefits. Both Federal and Pennsylvania laws protect federal benefits, allowing savings for tax-free savings on interest or returns. In other words, as long as the ABLÉ account is used to pay for Qualified Disability Expenses, no income tax is owed.

As of January 1, 2018, the ABLÉ Savings Program has implemented a few changes:

- Annual Contribution Limit: The Annual Contribution Limit is a yearly limit on how much money can be contributed to an ABLÉ account. Under the new revisions, the maximum yearly contribution limit is now set

at \$15,000, the amount was \$14,000. Regardless of the number of contributors, all sources may not exceed \$15,000 for each account. This amount may increase over time due to inflation

- **ABLE Financial Planning Act:** The ABLE Financial Planning Act amends the Internal Revenue Code to allow tax-free rollovers of amounts in 529 College Savings plans to qualified ABLE programs. To avoid this during the transfer, an individual must take a Non-Qualified Withdrawal from the 529 College Savings account and deposit the proceeds into the ABLE account. However, he or she would owe state and federal income taxes on the earnings portion of the 529 account withdrawal. The individual would not pay the additional 10 percent tax penalty typical to most 529 College Savings account withdrawals, as long as the reason was due to the disability of the named beneficiary. In addition, the beneficiary must be the same individual on both accounts or a family member of the 529 College Savings account beneficiary. The funds transferred from the 529 College Savings account remain subject to the annual contribution limit of \$15,000.



**Variety - The Children's Charity** provides children with disabilities unique programs, experiences, and equipment, so they may live life to the fullest and not be left out, left behind, or excluded.

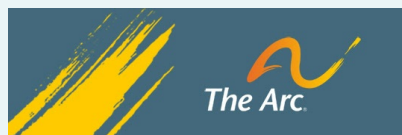
**Variety's "My Bike Program"** currently provides eligible children with disabilities with a Rifton adaptive bicycle (with Rifton accessories) that is individually customized, so they may have the freedom of a bike and the joy of riding alongside friends and family.

**Variety's "My Stroller Program"** currently provides a Kid Kart® Mighty Lite adaptive stroller to eligible kids with disabilities. Typically, a family must choose between having a wheelchair or adaptive stroller. So, as a wheelchair is more necessary, an adaptive stroller allows for easier "on-the-go" transportation and participation in daily activities and throughout the community. With an adaptive stroller, kids are no longer isolated and it has an immediate impact on their lives.

**Variety's "My Voice Program"** provides a communication device (currently an iPad with a prescribed communication app) to eligible children with a communication disorder to give them a voice at all times - enabling kids to express their thoughts, feelings, wants, and needs.

Variety's "My Bike" Program kicked off in Western Pennsylvania on November 5, 2012, and the success of "My Bike" led to the creation of "My Stroller" and "My Voice" on November 14, 2014. Nearly 2,500 adaptive bikes, adaptive strollers, and communication have been sponsored for kids since November 5, 2012 (that's nearly \$3.7 million worth of equipment).

[Read more here](#)



## The Arc Celebrates Law Enacted to Support Family Caregivers

The Arc released the following statement in response to the bipartisan Recognize, Assist, Include, Support, and Engage (RAISE) Family Caregivers Act signed into law by President Trump.

"Most people with intellectual and developmental disabilities (I/DD) in our nation live with family caregivers, and nearly 900,000 of these family caregivers are over the age of 60. For many individuals with I/DD, their caregivers mean a life in the community with their family and friends. Without support for these caregivers, individuals with I/DD could face seclusion in institutional settings.

"These caregivers are providing invaluable assistance with meals, transportation, personal hygiene, money management, and any other support needed. Even families that are fortunate enough to have formal long term supports and services in place for their loved ones - overwhelmingly funded through Medicaid - often maintain lifelong caregiving responsibilities. The demands of caregiving can be enormous, particularly for aging caregivers, which is why this law is so meaningful to The Arc's community.

[Read more here](#)

## ATTORNEY SPOTLIGHT

Jim Shields

Attorney Jim Shields grew up in Pittsburgh and graduated from St. Francis College. He went on to Law School at Notre Dame and graduated in 1993. Jim became heavily involved in special needs planning as a result of helping a colleague make a plan for his autistic child. This led Jim to giving seminars all over Western Pennsylvania about estate planning for families with special needs children. You may have recently seen Jim on KDKA TV and WPXI talking about estate planning. Jim has authored nine books on estate planning, one being a booklet entitled "12 Facts That Every Special Needs Family Needs To Know About Estate Planning".



Jim is also the proud father of five children, Madeline, Catherine, Elizabeth, Jackson and Jamison, and is married to his lovely wife Denise.

If you or someone you know, would like a copy of Jim's booklet [12 Facts That Every Special Needs Family Needs To Know About Estate Planning](#), please call our office at (724) 934-5044 or go online at [www.shieldsandboris.com](http://www.shieldsandboris.com) to request a copy.



### 2018 SPEAKER SERIES - REGISTRATION OPEN Future Planning Series Presented by ACHIEVA Family Trust and ACHIEVA Advocacy

#### FRIDAY MARCH 9, 2018

Understanding Guardianship and Power of Attorney -  
What's Best For My Loved One?  
9 - 11 A.M.  
Speaker - Nora Gieg Chatha, Esq.

[Attend in Person](#)  
[Attend Via Live Webinar](#)

#### FRIDAY APRIL 13, 2018

Update on Medicaid Services in Pennsylvania  
9 - 11 A.M.  
Speakers - Janice Meinert, Paralegal, Pennsylvania Health Law Project  
and Erin Ninehouser, Pennsylvania Health Access Network

[Attend in Person](#)  
[Attend Via Live Webinar](#)



Location of Programs:  
ACHIEVA  
711 Bingham St.  
Pittsburgh, PA 15203  
412-995-5000 x589



### 5th Annual Disability Summit

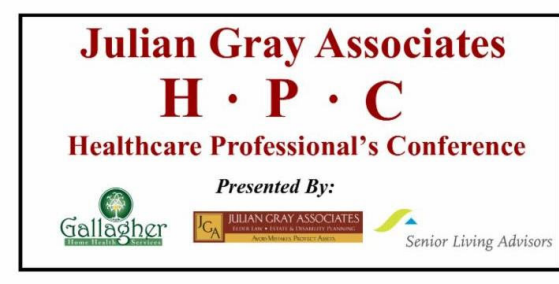
The 2018 5th Annual Disability Summit is scheduled for March 22 - 23, 2018 at Beth El Congregation, 1900 Cochran Road, Pittsburgh 15220. There will be informative sessions during the summit.

Teresa Miller, Secretary of Human Services will be in

attendance on March 22, and Pedro Rivera, Secretary of Education on March 23.

The Summit is free and open to the public.  
[Click here](#) for more information.

## SAVE THE DATE



### Healthcare Professional's Conference Tuesday, May 15, 2018

Time: 7:30am - 3:30pm

Location: Hilton Garden Inn Pittsburgh/Southpointe

Early Bird Registration will Open on Monday, February 26, 2018

Questions about the Conference?

Contact Erinn Sentner-Mule at [erinn@grayelderlaw.com](mailto:erinn@grayelderlaw.com) or call 412-458-6002

Timely and Informative Topics for your staff:

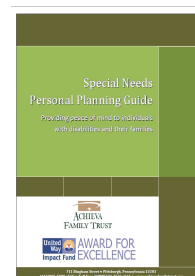
- Updates on Community Health Choices
- The Cost of Failing to Plan Ahead
- Dementia-Friendly Environmental Designs
- Mental Illness and The Involuntary Commitment Process
- Quality Improvements in the Workplace for Long Term Care

*Five Continuing Education Credits (Approvals Pending)  
Nurses, Social Workers, Nursing Home Administrators, PCH Administrators*

## SPECIAL NEEDS FUTURE PLANNING RESOURCES

### Special Needs Personal Planning Guide ([DOWNLOAD](#))

The Future Planning Guide is a resource and profile of your family member containing all of the information that makes them unique. The details of this picture include your family member's health history as well as their experiences with life and learning, family and friends and likes and dislikes. The Future Planning Guide assists in developing a plan to help ensure that your family member's needs are met day-to-day, on special occasions and in times of emergency.



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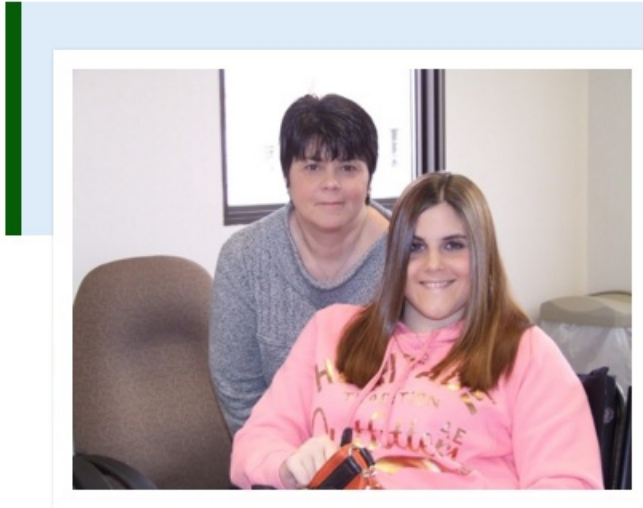
### Future Planning Attorney List (Greater Pittsburgh Area) ([DOWNLOAD](#))



See our list of attorneys located in Pittsburgh and the surrounding area who have expressed an interest and are willing to assist families and individuals with disabilities regarding their future planning needs. These attorneys can assist families in determining the types of future planning that will best meet their needs. In addition, these attorneys are able to draft future planning documents that may include a Last Will and Testament, Special Needs Trust, Power of Attorney and Living Will. If you are interested in future planning, please feel free to contact one or more of the attorneys listed in order to discuss your needs.

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## ACHIEVA Family Trust for Special Needs Trusts ([WEBSITE](#))



“ ACHIEVA protects her money from her going out and blowing it, or anyone else getting their hands on it. It helps her use that money and feel normal to do the things she likes. With the trust, Kara can do the same things that other kids do. ”

ACHIEVA Family Trust has been providing services to help families and individuals with disabilities plan for their future for more than 17 years. Individuals with disabilities and their families face significant challenges in planning for their financial stability. ACHIEVA Family Trust provides information to individuals and can serve as trustee for several kinds of trusts benefiting individuals with disabilities.

ACHIEVA Family Trust:

- Serves as Corporate Trustee for Common Law Trusts, Pooled Trusts and Payback Trusts to benefit individuals with disabilities.
- Distributes trust funds to increase individuals' quality of life while preserving eligibility for essential government services.
- Adds case management and social work expertise to the traditional role of corporate trustee.
- Utilizes the expertise of PNC Bank and Capital Group for Investment Management.

## VIEW ARCHIVED WEBINARS

### I WANT TO WORK BUT I AM AFRAID OF LOSING MY GOVERNMENT BENEFITS

*Presenters: Bill Frase, Assistant Director of Community Employment, ACHIEVA, Joy Smith, Area Manager AHEDD, Office of Vocational Rehabilitation (OVR), Marci Katona, and Josie Badger, #IWantToWork Campaign Manager*

[VIEW WEBINAR](#)

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### TEN THINGS YOU NEED TO KNOW ABOUT SPECIAL EDUCATION

*Presenter: Jeff Ruder, Esq., Ruder Law*

[VIEW WEBINAR](#)

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### WHAT'S NEW WITH THE OFFICE OF DEVELOPMENTAL PROGRAMS (ODP) - WAIVER

## RENEWALS FOR THE CONSOLIDATED AND PFDS WAIVERS, INCLUDING THE NEW SERVICES

*Presenter: Kristin Ahrens, Director, Bureau of policy and Quality Management, ODP*

[VIEW WEBINAR](#)

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## MANAGED LONG TERM CARE AND WAIVERS

*Presenter: Janice Meinert, Paralegal, Pennsylvania Health Law Project*

[VIEW WEBINAR](#)

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## HIPAA LAWS AND CONFIDENTIALITY OF MENTAL HEALTH INFORMATION/MENTAL HEALTH ADVANCED DIRECTIVES

*Presenters: Mark Zacharia, Esq., Associate Counsel, UPMC Corporate Legal Department  
Julianne Washington, Esq.*

[VIEW WEBINAR](#)

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## TURNING 26? HAPPY BIRTHDAY AND HAPPY NEW WORLD OF HEALTH INSURANCE

*Presenters: Sally Jo Snyder and Leslie Bachurski, Consumer Health Coalition  
Libby Powers and Susan Saule, CHANGE Children's Hospital*

[VIEW WEBINAR](#)

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## EDUCATIONAL TRANSITION PLANNING FOR CHILDREN AGES 14 - 22

*Presenters: Dr. Erin Grimm, Allegheny Intermediate Unit, Eric Jankoski, Baldwin Whitehall School District Transition Coordinator, Mary Hartley, 21 & ABLE, United Way of Southwestern PA, Sarah Vogel, Office of Vocational Rehabilitation (OVR)*

[VIEW WEBINAR](#)

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## GUARDIANSHIP & POWERS OF ATTORNEY

*Presenters: Heidi Rai Stewart, Esq. and Matthew Lautman, Esq., Houston Harbaugh*

[VIEW WEBINAR](#)

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## SSI, SSDI & REPRESENTATIVE PAYEES

*Presenter: Elaine Cole, Public Affairs Specialist, Social Security Administration*

[VIEW WEBINAR](#)

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## MEDICAID, MAWD, & WAIVERS

*Presenter: Erin Guay, Paralegal, Pennsylvania Health Law Project*

[VIEW WEBINAR](#)

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## MEDICARE

*Presenter: Bill McKendree, Team Leader, APPRISE State Health Insurance Program*

[VIEW WEBINAR](#)

### ACHIEVA Family Trust

711 Bingham Street  
Pittsburgh, Pennsylvania 15203  
(412) 995-5000 x 565

[Visit Our Website](#)

[Email Us](#)

ACHIEVA is an agency that is dedicated to providing the best quality services for people with disabilities in "celebrating abilities and exceeding expectations."

*STAY CONNECTED*

