



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



APRIL 2018

In this Newsletter.....

ACHIEVA Family Trust Launches New Website

Upcoming Speaker Programs

Update on Medicaid in Pennsylvania

Future Planning/Financial Planning Seminars

Mistakes Retirees Make - Beneficiaries with Special Needs

Many People with Disabilities Not Taking Advantage of Tax Credit

Federal Budget Boosts Special Ed Funding, Addresses Autism Wandering

Future Planning Resources

Special Needs Personal Planning Guide

Future Planning Attorney List for the Greater Pittsburgh Area

ACHIEVA Family Trust for Special Needs Trusts

View Archived Webinars



ACHIEVA Family Trust Launches New & Updated Website!

ACHIEVAFamilyTrust.org

The site is easy to navigate, no matter what viewer you're using



**Visit the new site & contact us
to receive a no-cost consultation today!**

ACHIEVAFAMILYTRUST.ORG

Call (412) 995-5000 x565 or 1-888-272-7229
or email familytrust@achieva.info

[Read more about our new website here](#)



Update on Medicaid Services in Pennsylvania

**Friday April 13, 2018
9 - 11 A.M.**

**Speakers - Janice Meinert, Paralegal, Pennsylvania Health
Law Project and Erin Ninehouser, Pennsylvania Health
Access Network**

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

Sponsored by:



*Free and Accessible Parking
Light breakfast will be served*

DO YOU HAVE QUESTIONS ABOUT **FUTURE PLANNING/ FINANCIAL PLANNING**

ACHIEVA Family Trust and Hefren-Tillotson are offering a series of seminars that provide education and outreach on financial topics including estate planning, taxes, and investment options.

Attend one of five regional speaker programs:

Presented by ACHIEVA Family Trust and Darren L. Hucko, CFP®, RICP®, Vice President & Financial Advisor of Hefren-Tillotson, Inc. through a grant from The Financial Planning Foundation.



TO REGISTER:

- ☎ 412.995.5000 x 589
- ✉ familytrust@achieva.info
- 🌐 achievafamilytrust.org

- ▶ **ACHIEVA**
711 Bingham St.
Pittsburgh, PA 15203
Friday May 11, 2018
9:00 - 11:00 AM
- ▶ **Hefren Tillotson**
Wexford Office
12570 Perry Highway, Suite 100
Wexford, PA 15090
Wednesday May 16, 2018
6:30 - 8:30 PM
- ▶ **Hefren Tillotson**
Southpointe Office
121 Champion Way, Suite 110
Canonsburg, PA 15317
Tuesday June 5, 2018
6:30 - 8:30 PM
- ▶ **ACHIEVA/
The Arc of Westmoreland**
316 Donohoe Rd.
Greensburg, PA 15601
Thursday June 14, 2018
6:30 - 8:30 PM
- ▶ **Autism Connection of PA**
35 Wilson St.
Pittsburgh, PA 15223
Thursday June 21, 2018
6:30 - 8:30 PM

Mistakes Retirees Make - Beneficiaries with Special Needs

Jeff Marshall, Esq

Pennsylvania retirees often make legal and estate planning mistakes because of a lack of accurate information and guidance. These mistakes can impact the retirees' financial security and prevent them from achieving important goals.

The existence of a child, grandchild, or other potential beneficiary with a disability (often referred to as "special needs") complicates the estate planning of a parent or grandparent. Proper planning of your will, trusts, and beneficiary designations becomes even more crucial to protecting your heirs.

With wise advance planning, you can provide for all of your family members without jeopardizing a special needs individual's current (or potential) eligibility for important government benefits such as Supplemental Security Income ("SSI") and Medicaid. These "needs based" government programs can provide substantial support for your special needs beneficiary but only if you set things up so that the beneficiary will be able to meet the programs' financial standards.

[Read more here](#)

Many People with Disabilities Not Taking Advantage of Tax Credit

From Julian Gray Associates (www.grayelderlaw.com)

Although millions of people each year earn cash refunds from the Internal Revenue Services (IRS) via the Earned Income Tax Credit (EITC), many others, including people with disabilities, are not taking advantage of this generous program.

In late January 2018, the IRS issued a Notice encouraging tax filers with disabilities, to apply for the EITC, noting the tax credit could put a refund of up to \$6,318 into an eligible taxpayer's pocket. According to the IRS, many eligible people miss out on the EITC because they fall below the income threshold requiring them to file taxes, even though they can still file taxes and possibly get the credit. Others incorrectly believe receiving the EITC will jeopardize their eligibility for other government benefits.



The EITC is available to individuals making up to \$15,010, a figure that rises based on the person's tax filing status and the number of qualifying children in the person's household. For a married couple filing jointly with three qualifying children, the maximum household income is \$53,930. Married couples filing taxes separately, as opposed to jointly, are not eligible for the EITC.

[Read more here](#)

Federal Budget Boosts Special Ed Funding, Addresses Autism Wandering

by Michelle Diamant



A \$1.3 trillion government spending package will aid those with disabilities who wander while increasing special education funding and tackling restraint and seclusion in schools, among other issues. The legislation signed by President Donald Trump funds the federal government through September.

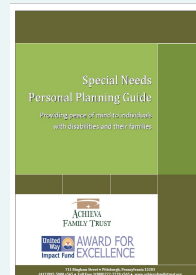
Advocates say they are happy to see that the measure includes increases for several programs people with disabilities rely on after weathering years of cutbacks. "Overall, we're pleased and we're relieved," said Annie Acosta, director of fiscal and family support policy at The Arc, who specifically cited gains for special education and housing. "But we have to keep in mind that we're still making up for cuts in previous years."

[Read more here.](#)

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 includes 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.



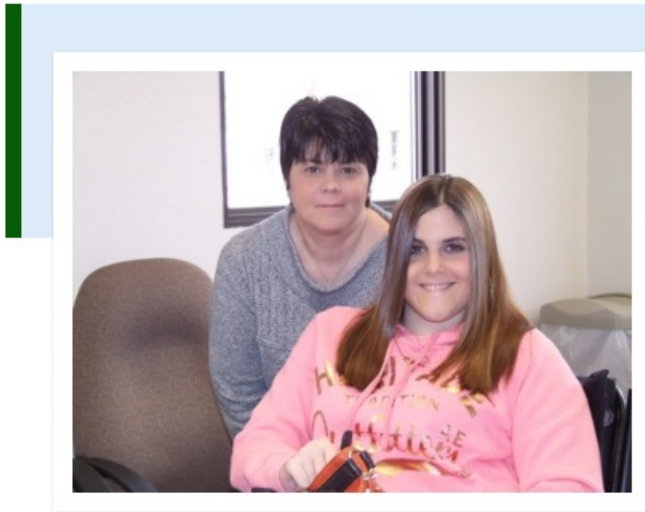
Future Planning Attorney List (Greater Pittsburgh Area) ([DOWNLOAD](#))



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 to discuss your needs.

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 20 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

UNDERSTANDING GUARDIANSHIP AND POWER OF ATTORNEY

Presenter: **Nora Gieg Chatha, Esq.**

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HOUSING OPTIONS FOR INDIVIDUALS WITH DISABILITIES

Presenter: **Michelle Stockunas, Program Manager, ACHIEVA, A Home of My Own**

[VIEW WEBINAR](#)

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](#)

TEN THINGS YOU NEED TO KNOW ABOUT SPECIAL EDUCATION

Presenter: Jeff Ruder, Esq., Ruder Law

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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](#)

MANAGED LONG TERM CARE AND WAIVERS

Presenter: Janice Meinert, Paralegal, Pennsylvania Health Law Project

[VIEW WEBINAR](#)

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](#)

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](#)

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](#)

GUARDIANSHIP & POWERS OF ATTORNEY

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

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SSI, SSDI & REPRESENTATIVE PAYEES

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

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MEDICAID, MAWD, & WAIVERS

Presenter: Erin Guay, Paralegal, Pennsylvania Health Law Project

[VIEW WEBINAR](#)

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

