

achieva

Family Trust

Protecting Futures. Enhancing Lives.



About Achieva Family Trust (AFT)

We are a nonprofit organization, established in 1998, that serves as corporate trustee for special needs trusts for people with disabilities. We currently serve over 2,300 beneficiaries and are responsible for more than \$150 million in assets under management. AFT also provides education for families/caregivers of individuals with disabilities regarding future planning needs.

People with disabilities and their families face significant challenges in planning for their futures. In addition to providing for the daily care needs of a family member with a disability, providing for their financial future without interrupting vital government benefits, is also a major concern. AFT provides comprehensive resources for individuals and families who are trying to establish a future plan for their loved one, including legal resources.

WHO SHOULD BE REFERRED TO ACHIEVA FAMILY TRUST?



- Family members of people with disabilities who want to begin to save for their future or are developing their estate plans
- Individuals with disabilities who have too many assets to remain eligible for government benefits
- A person with a disability who receives a financial settlement or inheritance that would affect their eligibility to receive government benefits

SERVICES PROVIDED BY ACHIEVA FAMILY TRUST

- Corporate Trustee for Third Party, Pooled and Payback Special Needs Trusts for Individuals with any type of disability, including physical, mental health and intellectual. Beneficiaries served across Pennsylvania and 12 other states
- Reasonable fees for Trust Administration. Trusts can be established with as little as a \$500 minimum deposit
- Trust Administrators who are knowledgeable and experienced in social services provide guidance to preserve eligibility for government benefits
- No-cost consultations provided to individuals, families and professionals regarding issues such as government benefits and future planning
- Free Online Future Planning Guide
- List of attorneys who are familiar with special needs planning.
- Information on ABLE accounts
- Charitable Residual Account that provides grants for individuals with disabilities across the state of Pennsylvania

Contact Information:



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