How to fund a Special Needs Trust?
What are the investment criteria and ways to stretch funding sources to last a lifetime?

Come learn with us!

Tuesday, October 19th on ZOOM
6pm-8pm

Cost: $20
Sponsorships are available upon request for families in need of financial assistance.

To register, click HERE.

Session topics include:

- **Explain the source of typical SNT Funding**
- **Discuss typical governing sections of the SNT**
- **Explain criteria of hiring and working with an investment advisor**
- **Discuss duties of the Trustee and UPIA, its impact on the advisor/fiduciary relations and its compliance**
- **Discuss components of investment management specific to the special needs consumer**

Meet our presenters!

Janie Mulrain is a licensed professional fiduciary with expertise in administering various trusts and estates including SNT. She is often called upon to take over litigated trusts and conservatorships. She is also a frequent guest speaker at industry conferences and community events and leverages her knowledge of public benefits and resources for the benefit of her special needs clients.

Scott MacDonald is the founder and leader of the Special Needs Team at Merrill Lynch Wealth Management, a group of financial advisors and client associates dedicated to enhancing the long-term well-being of special-needs, disabled and elderly individuals by offering financial advice and guidance. Scott joined Merrill in 1987 and has spent his entire career addressing the unique needs of society's most vulnerable members. He offers extensive knowledge of California Probate Code restrictions on investments, as well as the terms of the Uniform Prudent Investor Act. A regular lecturer and media contributor, he is the author of numerous articles and publications related to special-needs and elder financial strategy.

Donovan Filpi is a Wealth Management Advisor and Vice President with the Special Needs Team at Merrill Lynch. Donovan works closely with clients in Orange County and San Diego, developing customized strategies to help them identify their life goals and pursue those objectives with clarity and resolve. Donovan joined Merrill Lynch in 2006 and he is a CERTIFIED FINANCIAL PLANNER™ certificant, a designation awarded by the Certified Financial Planner Board of Standards, Inc. He also holds the Chartered Retirement Planning Counselor℠ designation awarded by the College for Financial Planning.

Questions?
Email centertraining1@uci.edu or call us **949-267-0227**.

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