



## Supplemental Needs Trust Services

A supplemental needs trust (sometimes called a “special needs trust”) is created to provide financial assistance for a beneficiary without disqualifying that beneficiary from receiving governmental assistance, such as Medicaid or Supplemental Security Income (SSI).

These trusts contain special provisions specifying that trust assets are to be used to supplement, and not replace, the governmental assistance. Without these special provisions, the trust might disqualify the beneficiary from receiving the governmental aid.

As trustee of a supplemental needs trust, Stifel Trust provides the following services:

Administration of the Trust According to Its Terms	Prudent Management of Trust Assets	Safekeeping of Assets
Collection of Dividends, Interest, and Other Income	Efficient Cash Management	Calculation of Required Annual Distributions
Other Payments to or on Behalf of the Beneficiary Per the Terms of the Trust	Preparation of the Trust’s Income Tax Return	Tax Information for Beneficiaries
Proxy Voting	Monthly Statements	

▶ For more information on supplemental needs trust services, please contact your Stifel Financial Advisor.

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