Riverview
TRUST COMPANY

SPECIAL NEEDS TRUST

TURN TO US FOR:

PEACE OF MIND

Our sole focus is providing financial administration while you handle the tough job of being a caregiver.

A CUSTOM EXPERIENCE

Our local administration lets us treat you and your special beneficiary like people, not account numbers.

EXPERIENCE AND QUALIFICATIONS

Our team of professionals has an average of over 18 years of experience in trust administration and they hold numerous professional credentials, such as Certified Trust and Financial Advisor, Certified Financial Planner, accountant, and attorney.

CARING FOR A PERSON WITH SPECIAL NEEDS presents you with many challenges. As you arrange for his or her medical care, support and comfort, your own needs can take a back seat. While we can't help you with all of these challenges, we can help you find more time for yourself and enjoy time with your loved one by acting as trustee, or as agent for the trustee, of a special needs trust for his or her benefit.

Special needs trusts can take many forms. The most common are trusts designed to provide comforts and services without disqualifying the beneficiary from receiving government benefits. They can also serve as an alternative to a structured settlement, holding proceeds from personal injury litigation. Regardless of the reason it was created, a special needs trust is designed to provide the best care possible for as long as it is needed.

As trustee, we can coordinate and communicate with family members, attorneys, health care professionals, state social workers, and others, to align services to the beneficiary's needs. We can work with your attorney to structure the trust to provide the needed care, without disturbing valuable government benefits. We can also implement an investment strategy that focuses on delivering superior long-term service to these special beneficiaries. When we act as agent for you as trustee, we provide you with bookkeeping, bill paying, and investment strategy.

For more information, contact us at:

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