



Alabama Family Trust: Our View on Legal Advice

Our View on Legal Advice

Alabama Family Trust is a non-profit pooled special needs trust administration company. While many members of our board and staff are attorneys, Alabama Family Trust is not a law firm and does not provide legal advice or assistance to the public.

Things Alabama Family Trust can do:

- Assist you in completing Alabama Family Trust documents
- Help you understand what documents you need to provide in order to establish an Alabama Family Trust trust
- Give you information about how Social Security or Medicaid should view certain payments made from the trust
- Answer questions that deal specifically with an Alabama Family Trust trust you have established

Things Alabama Family Trust cannot do:

- Provide legal advice
- Calculate the amount of money you should deposit into the trust
- Tell you what you could or should do to qualify for government benefits
- Assist you in obtaining government benefits
- Give advice on how you should respond to or interact with the Social Security Administration or a Medicaid Agency

You are not required to have an attorney to establish a trust with Alabama Family Trust, and many of our trusts have been established without any known assistance from an attorney. However, the establishment of a trust, by itself, may not be enough to resolve all eligibility issues with Social Security or a Medicaid Agency. Navigating the rules and regulations of these agencies can be very complicated.

If you want to be certain that you have taken all appropriate measures in your planning, Alabama Family Trust recommends individuals seek legal counsel to guide them through the process of properly obtaining Supplemental Security Income (SSI) and Medicaid benefits.