



**MARGOLIS  
& BLOOM, LLP**  
*Planning for Life*

## **PERSONAL INJURY SETTLEMENT CONSULTING DOES MY CLIENT NEED A SPECIAL NEEDS TRUST?**

1. Is the plaintiff a “disabled” person?

YES       NO

2. Has the person received a disability determination by the Social Security Administration (SSA)?

YES       NO

3. Has the person or could the person apply for a determination of disability by the SSA?

YES       NO

4. Is the disabled person receiving or likely to receive any of the following means-tested public benefits?

- Supplemental Security Income
- MassHealth long-term care
- MassHealth community benefits
- Section 8 Housing or other subsidized housing
- Food stamps
- Group homes
- Psychiatric institutionalization
- Other \_\_\_\_\_

**If the answers to any of the questions above is YES, a special needs trust should be considered. Please contact Attorney Christina T. Vidoli, at (617) 267-9700, or [cv@margolis.com](mailto:cv@margolis.com), to learn more about how a trust may be detrimental to preserving your or your loved one’s settlement award.**