

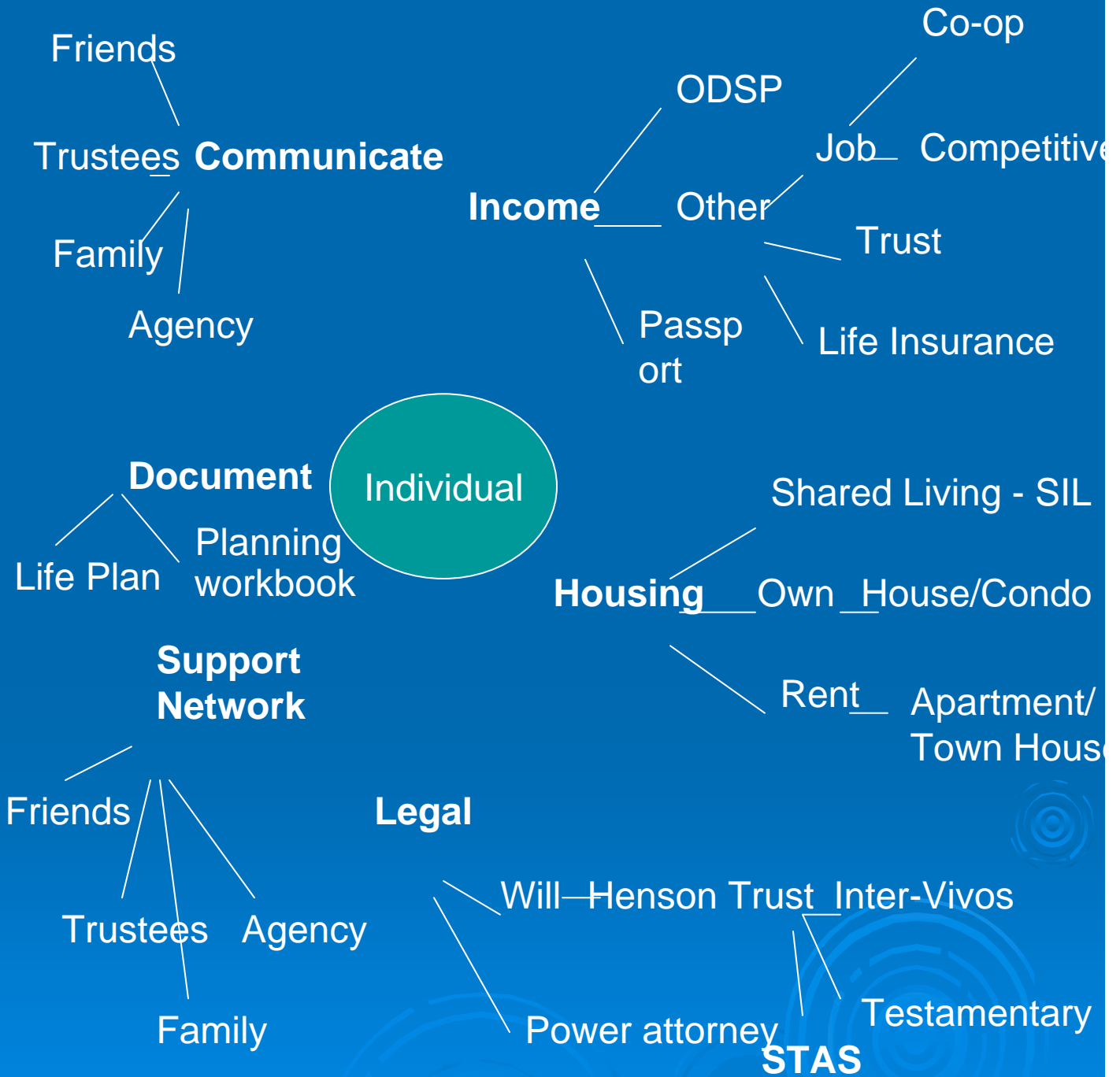
# SUPPORT & TRUSTEE ADVISORY SERVICES

“The best way to predict  
the future is to invent  
it”

(Alan Kay)



# Planning for an Individual



# Support & Trustee Advisory Services (STAS) - PURPOSE

- Educates parents, lawyers and other professionals about the special precautions that they must make in preparing a will and trust for an individual who has a disability.
- Provides families with resources to assist them with future planning for their loved one including the “PARENT PLANNING GUIDE”
- Assists with the establishment of specialized trust funds for individuals who have a disability;
- Has an agreement with Royal Trust that requires a Participation Agreement between STAS and the family member establishing the trust;
- Works closely with staff of Peel agencies supporting individuals who have a disability;

# Document



- Life plan is key component in future planning- a resource that describes and outlines your loved one's life: describes their hopes, dreams and their own vision of their life
- Loved one should be involved in preparing life plan
- STAS Parent Planning Guide is one resource available to families
- Plan will be a work in progress – evolving as your loved one's life changes

# Communicate

- Tell others – family and friends about your plan
- Tell your service provider – leave them a copy of your plan
- Make sure those who will be around your child know and understand your child's needs and what is important to them.



# Support Network

- Currently family/friends support – usually parents are central link and driving force
- Can be a formal or informal circle
- Need something in place for after parents no longer able to be involved – why not start now?
- Important that the individual is central in circle and involved with planning



# Housing

- Families can be creative when thinking about where their loved one will live; no guarantee that loved one will be supported residentially by an agency
- Future planning also involves thinking about where your loved one will live and the financial piece should be included in the future plan



# Legal

- Important to leave inheritance for individual
- Unless set up properly a will can jeopardize ODSP
- Cost of living will not go down
- Henson Trust/Absolute Discretionary Trust
- Importance of choosing a trustee
- Options available including STAS



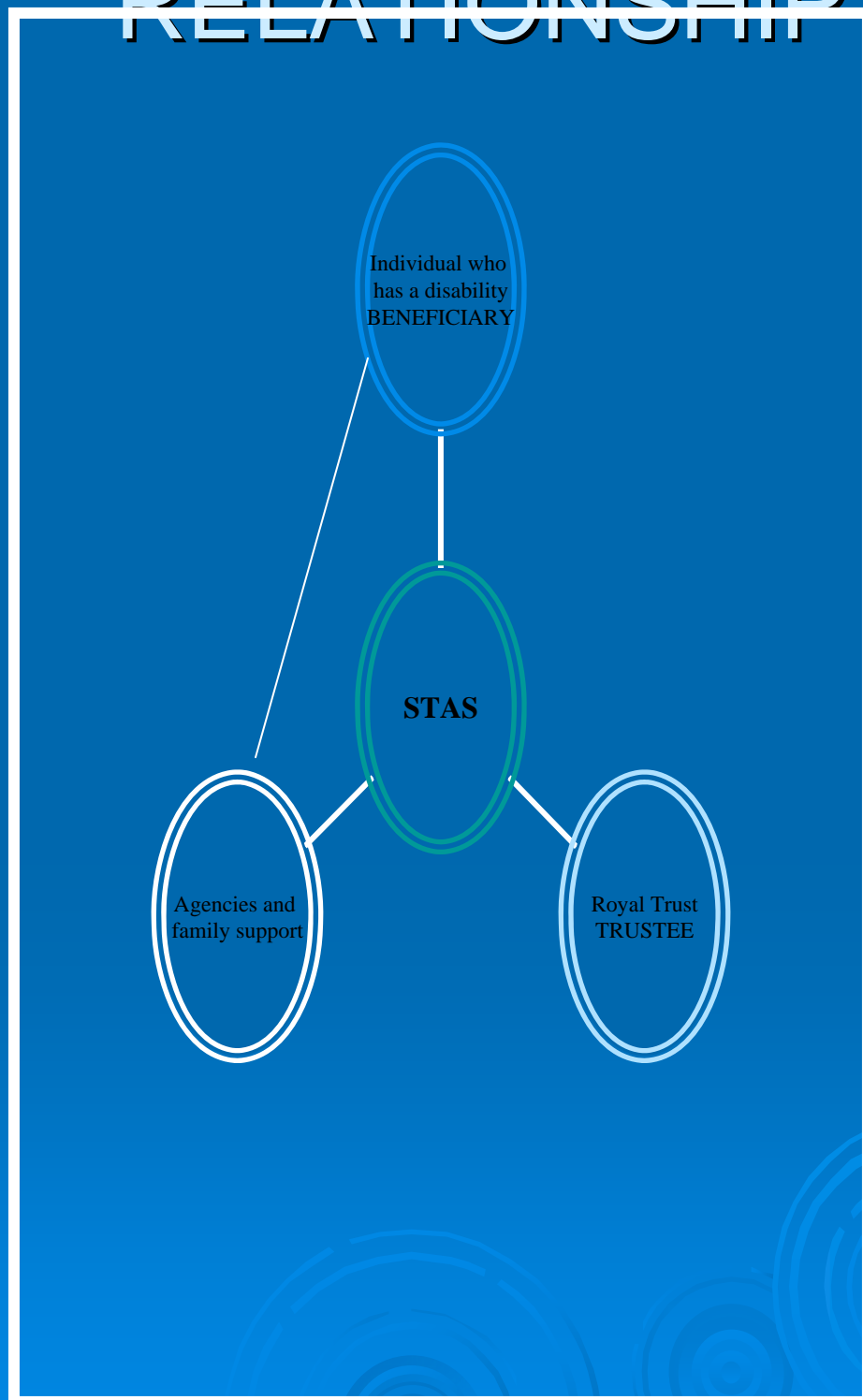
# WHY A TRUST?

- Part of your overall estate plan;
- Allows for funds to be set aside which compliment ODSP and other government funds;
- Provides for extras to improve the quality of life of your loved one who has a disability when you are gone.

# STAS and Royal Trust- BENEFITS

- Permits families to establish a trust for their loved one with a minimum of \$10,000 rather than the amount required to establish a trust privately (\$100,000 +);
- Names Royal Trust as Trustee;
- Provides continuity of service between Trustee and Beneficiary and their support network;

# STAS – TRUSTEE RELATIONSHIP



# STAS -RESOURCES

PARENT PLANNING GUIDE  
WORKBOOK

NEWSLETTER

PARENT BROCHURE AND FACT  
SHEET

LIST OF ALTERNATE RESOURCES

LAWYERS LIST

[www.supportandtrusteeadvisoryservices.ca](http://www.supportandtrusteeadvisoryservices.ca)