

Heritage Living Trust

"Special Needs" Provision

Today's Date: _____

Agent's Name: _____

Agent's Phone Number: _____

Name of Clients: _____

Client Email Address: _____

Full Legal Name
Of "Special Needs" Child: _____

Is this Provision for an
Adult or Child: _____

Special Needs Child's
Date of Birth: _____
(Must be under 65 years of age)

Event of Disability: _____

(Brief Description of disability or situation)

In the event of the "special needs" child's death, the balance of his/her inheritance should: (Circle one)

- a) Be given to his/her children
- b) Revert back to Trust to be distributed to the remaining Beneficiaries
- c) Other

(Explanation) _____

Is there a Court Guardianship or Conservatorship in place?

Circle one: Yes No

If yes, the "Special Needs" provision may not be used.
Parents must have full legal custody.