

The Arc of New Mexico Pooled Master Trust Program offers two types of trusts:

- MTI is an irrevocable self-funded trust
- MTII is a revocable third-party trust

The Arc of New Mexico Pooled Master Trust Program offers the following

- Managed by the Arc of New Mexico, a nonprofit organization with over 60 years of experience serving people with disabilities
- Over 20 years' experience in managing trusts
- Certified with the State of NM Financial Institutions Division and Regulation and Licensing Department
- Investments are professionally managed
- An affordable alternative to traditional bank trusts
- No minimum or maximum funding requirements
- Low enrollment costs
- Low annual fees for funded accounts
- Unlimited distribution requests
- Scheduled quarterly statements mailed; or as needed
- The Arc of NM's staff has knowledge and insight of government regulations that meet and adhere to client's needs
- Offers simple and prompt disbursement procedures while offering great customer service



The Arc of NM Pooled Master Trust I

The Arc of New Mexico Pooled Master Trust I, established in 1998, is a self-funded trust. A self-funded trust can be established with earnings, lottery winnings, direct inheritances, Social Security back payments, settlements, or judgement funds of the person with the disability, or with gifts to the person with the disability. Master Trust I allows the individual with the disability to maintain eligibility for government benefits, such as SSI, Medicaid, and Waiver programs. Upon the death of the beneficiary, any remainder funds in the trust must remain with The Arc of NM to benefit other individuals with disabilities.

The Arc of NM Pooled Master Trust II

The Arc of New Mexico Master Trust II, established in 1999, is a third-party trust. A parent or other third-party can establish a special needs trust with their own funds for the benefit of a loved one with a disability. Only funds from others can be added to this type of trust. Master Trust II allows the individual with the disability to maintain eligibility for government benefits, such as SSI, Medicaid, and Waiver programs. Upon death of the beneficiary, any remaining funds from the trust can be designated to family members, friends, and/or non-profit organizations.



FAQs

HOW DO I SET UP A TRUST?

We are here to assist every step of the way in opening a Master Trust I or II. Our Trust Administrators can meet with you to discuss the Trust and assist in preparing paperwork to establish the Trust. Call (505) 883-4630 or email arctrust@arcnm.org to set up an appointment.



(505) 883-4630

HOW DOES A TRUST PROTECT BENEFITS?

Social Security benefits provided to persons with disabilities are to be used primarily for food and shelter. If a person with a disability has over \$2000 in their bank account, the excess funds could jeopardize the continued eligibility of receiving government benefits. A trust allows funds to be saved in an account that does not impact these benefits. (www.ssa.gov/benefits)



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WHAT CAN I USE THE MONEY FOR?

Monies from a trust may be used for activities, medical equipment, school tuition, educational materials, and/or services that the client would not otherwise be able to afford. Some examples include furniture, electronics, travel, and vacation expenses. (A sample list is provided on the website)



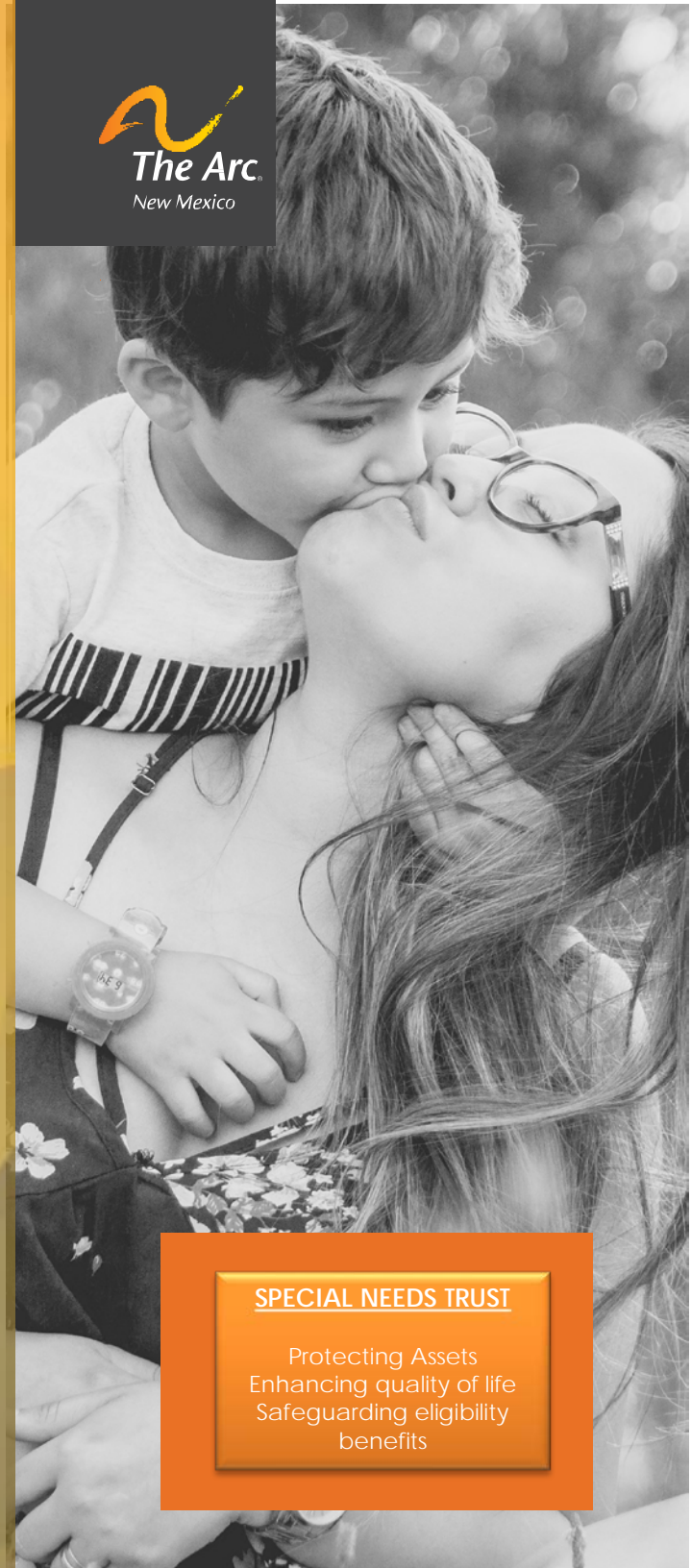
ARCTRUST@ARCNM.ORG

HOW DO I ACCESS THE FUNDS?

The Arc of New Mexico disbursement request forms that are completed by the client or guardian can be faxed, emailed, mailed, or dropped off at The Arc of NM's office. Disbursements may take up to 10 days for review and processing. (Various request forms are provided for your convenience on our website)



ARCNM.ORG



SPECIAL NEEDS TRUST

Protecting Assets
Enhancing quality of life
Safeguarding eligibility
benefits