



HOPE TRUST

PLANNING, NAVIGATION AND MANAGEMENT FOR A SPECIAL NEEDS LOVED ONE

Hope Trust's platform provides comprehensive, holistic planning services for parents and caregivers to those with special needs. Create a care plan and supplemental needs trust, arrange for support services and appoint a fiduciary who understands unique needs.

[HOPETRUST.COM](https://www.hopetrust.com)

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THE HOPE TRUST MISSION

Harness the power of technology and the dedication of skilled, knowledgeable professionals to serve and care for our clients and their families, enabling them to achieve their potential and live fuller, more rewarding lives.

OUR STORY

The people who founded and lead Hope Trust know what it takes to live with, and care for, a loved one with special needs.

Each of us knows the **unrelenting attention and effort required** to ensure our children, siblings, parents or others with special needs get the help they need. These requirements extend beyond daily tasks, including assistance at school and at home. As caretakers, we feel responsible for making sure they receive proper medical care, counseling, social services and even legal representation when necessary. On into their adulthood, **we manage** their **household needs, arrange food deliveries** and **transportation** along with **countless other tasks of daily life**, providing **financial support the entire way**.

Working in concert with your corporate fiduciary, Hope Trust can provide the high-touch, round-the-clock service it takes to administer a special needs trust. We created Hope Trust to answer these three questions asked by families affected by special needs:

WHO WILL TAKE CARE OF MY LOVED ONE WHEN I AM NO LONGER ABLE?

HOW WILL SUCCESSOR CAREGIVERS AND TRUSTEES UNDERSTAND MY LOVED ONE'S CHALLENGES AND NUANCES?

HOW MUCH MONEY DO I NEED TO LEAVE BEHIND TO ENSURE THAT MY LOVED ONE IS TAKEN CARE OF FOR THEIR LIFETIME?

WE'RE HERE BECAUSE YOUR FAMILY DESERVES THE BEST.

Hope Trust is the first and only comprehensive, holistic solution that addresses the unique and ever-evolving needs of loved ones with special needs.

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THE HOPE TRUST DIFFERENCE

Hope Trust takes a revolutionary approach to special needs planning and trust administration. Through our technology, we know every issue and challenge facing each beneficiary. With an amazing team of Hope Care Coordinators trained to serve those with challenges, we actively seek solutions to social, medical, financial, legal, and daily living struggles. Since we know that problems rarely occur during bank hours, we will soon be available 24/7/365. Call us anytime and you'll have US-based experts ready to assist.

CARE FOR YOUR NEEDS

Hope Trust's skilled care coordinators can support every imaginable challenge, behavioral, emotional, developmental or physical. This includes individuals who have dual diagnoses and chronic conditions. We serve individuals of all ages with psychiatric disorders, physical challenges, substance abuse problems, intellectual disabilities, brain injuries, dementia, and chronic physical illnesses or diseases.

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OUR SERVICES

PLAN

We apply proprietary technology to your intake questionnaire to create a personalized, comprehensive Care Plan. This Plan is richly detailed and articulates every aspect of your loved one's daily life and requirements. Our Meet Your Trust Objectives (MYTO) tool analyzes the beneficiary's financial needs and available resources, including government benefits, to create a roadmap for funding options. Our Special Needs Trust incorporates best practices and has been written and reviewed by the nation's leading experts. Upon completion, your legal and financial advisors will have the opportunity to review your plan and make any customizations you deem appropriate. Your Care Plan also will inform and guide our staff of care providers and your selected Trustee.

MANAGE

In lieu of the bankers and lawyers at most trust companies, your primary contact at Hope Trust will be our Care Coordination Team. Guided by the Care Plan, our team learns the nuances of each of our clients and then sources, coordinates and delivers the services your loved one requires. We're there for all of your needs – from the tasks of daily living and managing a household, to handling paperwork, or even arranging tickets to a ballgame or a vacation.

We provide the long-term answers you need with turnkey trust management and administration that combines concierge-style services with the fiduciary expertise of our partner, New York Private Trust Company. Your special needs trust will be managed and administered in accordance with your wishes, so your loved one receives the care they need throughout their lifetime.

SPECIAL NEEDS PLANING REQUIRES A SPECIALIZED TEAM HOPE TRUST PROVIDES THE FRAMEWORK

Bring Your Own Advisor

Hope Trust will work with your financial advisor to deliver a customized solution to meet your needs. Using our MYTO tool, advisors will be able project the impact government benefits programs will have on the trust to determine the appropriate trust funding level to achieve your goals.

Sharing the information in your care plan with you advisor will allow for comprehensive planning that will continue throughout the beneficiary's lifetime as your advisor may also serve as the investment advisor to your loved one's trust.

Build Your Team

Hope Trust can build a team of special needs focused advisors or work with your existing professionals. Our network of care planners, lawyers, bankers, investment advisors and insurance professionals will work with you and your loved one to ensure that all needs are fulfilled and that trust assets are used to efficiently enhance your loved one's life.

With the right financial planning, care planning, special needs trust, and team of advisors, you can rest assured that your loved one will be provided for as you intend.

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