

**For more information, please complete this form.  
Then mail it to:**

### **Guardianship & Trust Services**

Heritage Christian Services  
275 Kenneth Drive  
Suite 100  
Rochester, NY 14623

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

**Please contact me for further discussion on the following:**

- Guardianship services
- Trust services
- Other programs offered by Heritage Christian Services
- How to make a financial contribution
- Volunteer opportunities
- Add me to your mailing list

Looking for family caregiving support or services for your loved one? Ask to speak with our resource advisor by emailing [info@heritagechristianservices.org](mailto:info@heritagechristianservices.org) or call the office.

**At Heritage Christian Services, people come first.**

HCS is a thriving human services agency that serves thousands of people throughout the greater Rochester and Buffalo areas by providing meaningful introductions and offering experiences that assist others in navigating and achieving what matters most to them.

The agency offers residential support, service coordination, respite, community habilitation and employment supports. It has received a Compass designation by the Office for People With Developmental Disabilities for being one of New York state's top service providers to people with special needs and earned national accreditation from the Council on Quality and Leadership.

Heritage Christian Services is known for innovative community impact programs including the Pieters Family Life Center and Expressive Beginnings Child Care in Henrietta, the Center for Human Services Education and A Second Thought Resale Shop in East Rochester, Springdale Farm in Ogden and Heritage Christian Stables in Webster.



**HERITAGE**  
CHRISTIAN SERVICES



**HERITAGE**  
CHRISTIAN SERVICES

*Empowering people. Enriching lives.*

**Corporate Office:**  
275 Kenneth Drive, Ste 100  
Rochester, NY 14623  
Tel. (585) 340-2000  
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Suite 800  
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**TDD (800) 662-1220**

[www.heritagechristianservices.org](http://www.heritagechristianservices.org)  
[info@heritagechristianservices.org](mailto:info@heritagechristianservices.org)



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# Guardianship & Trust Services

Who will care for your loved one when you no longer can?

## HERITAGE GUARDIANSHIP SERVICES

### Gaining Peace of Mind

Heritage Christian Services offers guardianship services, education and support to families in our residential program.

In New York state, parents are guardians until their child reaches age 18. That's when ALL adults, regardless of a disability, are considered legally competent and able to manage their own affairs. However, many adults with developmental disabilities do not have the ability to make "informed decisions" regarding their care. **One option** may be to establish a **guardian** who can look out for their medical, financial or personal interests. Heritage Christian Services can educate you on the options available.

A guardian, approved by the court and acting with legal authority, can advocate on behalf of a person's wishes, values and best interests. **Only the court can legally appoint a guardian. Guardianship cannot be established by designating someone in your will.** A guardian can be a friend, a relative or a not-for-profit organization, such as Heritage Christian Services. Guardianship is a life-long commitment. Along with appointing a primary guardian, a family often opts to name a standby guardian, and alternate standby guardians who can assume responsibilities in the event that the primary guardian dies or becomes incapacitated.

The HCS guardianship coordinator is available to educate families and staff regarding the roles and responsibilities of guardianship. The coordinator also serves as a personal contact and advocate on behalf of those for whom the agency serves as guardian. The HCS guardianship committee approves all major guardianship decisions and new guardianship appointments. When a person who resides with Heritage Christian Services would benefit from guardianship, HCS can be legally designated as primary or standby guardian. **The HCS guardianship committee will only consider this designation when there are no family members able to fill this role.** In this case, members of our team will ensure your loved one receives quality care throughout their lifetime.

For more information, call the HCS guardianship coordinator at (585) 340-2000 or visit [www.heritagechristianservices.org](http://www.heritagechristianservices.org).

## HERITAGE TRUST SERVICES

### Enhancing Quality of Life

Typically, parents leave money to their children by means of a will or living trust. But for a child with a developmental disability, an inheritance or gift of any size could jeopardize their eligibility for government aid, such as Supplemental Security Income or Medicaid.

To prevent that from happening, Heritage Christian Services Foundation can assist you with setting up a **Special Needs Trust** that provides income and allows your loved one to receive gifts without jeopardizing benefits.

While government benefits provide only for the bare necessities—food, shelter and clothing—a Special Needs Trust allows your loved one to achieve a higher quality of life by providing money for such "extras" as summer camp, outings to the movies or lunch with a friend, purchase of adaptive equipment, or even a vacation.

Heritage Christian Services also operates a **Pooled Special Needs Trust** for those it serves. In this case, resources are pooled for investment purposes, often reducing risk and cost. Each individual has a share in the fund based on family contributions. It's important to note that a Pooled Special Needs Trust is strictly to benefit your loved one, and no portion of a family's contribution is used to benefit anyone else during their lifetime.

The initial contribution is a minimum of \$5,000. Additions of \$1,000 or more can be made at anytime during your lifetime or through your estate plan. Many families choose to fund the trust through vehicles such as life insurance policies and retirement plans.

Parents may also name the fund in their will or as a beneficiary of insurance or retirement plans to benefit their disabled child. To do so, simply add the following words to your will:

*I give, bequeath and devise (the sum of \_\_\_\_\_ or the following property or percentage of my/our estate: \_\_\_\_\_) to the Heritage Christian Services Foundation, Inc., as trustee of the Heritage Christian Services, Inc, Pooled Trust to be held and administered according to the terms of such trust for the benefit of \_\_\_\_\_ during his/her lifetime. Upon \_\_\_\_\_'s death, the remainder shall pass to the Heritage Christian Services Foundation, Inc.*

**There are two kinds of pooled trusts.** Parents and loved ones can set up and contribute to the Pooled Trust 1, which can be started with a minimum investment of \$5,000 and added to at any time. Many families choose to fund the trust through vehicles such as life insurance policies and retirement plans. Once your loved one passes, the leftover balance is directed to the Foundation to help it fulfill the promise to enrich the lives of people at Heritage Christian Services.

Individuals with special needs can contribute their own funds to the Pooled Trust 2 with a minimum investment of \$500. Unlike Pooled Trust 1, once the person passes, proceeds stay in the pooled trust and only benefit others who have invested in it.

In both cases, the Heritage Christian Services Foundation pools investments and manages the funds for optimum performance.



*Funds from a Special Needs Pooled Trust allowed Janet Sluja (far right) to take a vacation with friends.*

### HOW DO I LEARN MORE?

For information or help setting up a Pooled Trust, call Heritage Christian Services (585) 340-2000 or visit [www.heritagechristianservices.org](http://www.heritagechristianservices.org).