

What You Need to Know Before Your Child Turns 18

Conservatorship v. POA v. AHCD

Special Needs Planning



October 23, 2026 PWCF General Education Meeting

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(951)200-4921



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NICKERSON LAW
A PROFESSIONAL LAW CORPORATION
SPECIAL NEEDS PLANNING



Jeffrey C. Nickerson, Esq.

Legal Background

- J.D., M.B.A. & B.S. Finance
- Attorney over 30 years

Special Needs Background

- Member of Multiple Legal Organizations (NAELA)
- Temecula NAMI – Board of Director
- Inland Empire Autism Board Member
- Special Olympics
- Exceptional Sports - 501(c)(3)
- Community Involvement – Rotary, Chambers
- Speaker on Special Needs Planning & Benefits
- Parent of Adult Special Needs Family Members



Disclaimer

The following presentation is
Legal Information

Not Legal Advice



Interactive! Questions?



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Conservatorship Overview

Who Needs A Conservatorship?

Age 18, The Law Presumes a Person is Competent!

Physicians & Financial Professionals

May Not Talk With You!



If a Person Is Not Competent, Some Action Is Warranted.

**Conservatorship, or Financial Power of Attorney a&
Advance Healthcare Directive**



What is a Conservatorship?

- **Conservatorship** is a court process where a Judge appoints someone (the **Conservator**) to manage the personal care or finances of an adult (the **Conservatee**) who is not competent.

It is the Government taking away the rights of one person and giving it to another.



It's a Big Deal!



Detailed Process, Specific Steps to Ensure It Is Really Needed
Can be confusing and frustrating - but it is necessary to
protect the proposed Conservatee
(Called "Guardianship" in other states)



Alternatives to Conservatorship

- Financial Power of Attorney (POA)
- Advance Health Care Directive (AHCD)



Supportive Decision Making?



Types of Conservatorships

General Conservatorship

Usually for Persons who have lost mental capacity – Usually Elderly with cognitive and dementia issues.



Limited Conservatorship

Adults with Developmental Disabilities



LPS – Lanterman Petris-Short Conservatorship Mental Health Conservatorship



Conservatorship of the Person & Estate



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LPS Conservatorship

Mental Health Conservatorship

Biological Brain Disorders:

- Schizophrenia
- Bi-Polar Disorder (Manic Depression)
- Schizoaffective Disorder
- Clinical Depression, and

Qualifications:

- 1) **Gravely Disabled** – Cannot take care of basic needs; Food, Clothing & Shelter,
OR
 - 2) **Danger to Self or Others**
- ONLY the **Public Guardian** can bring an LPS Conservatorship – A
 - private person may not
 - If granted – lasts only 1-year and then must be renewed

Mental illness LPS Conservatorship...with a few exceptions.



My Comments

- History of pre-1960's abuse of locking people up with Mental Illness – Very Bad!
- The LPS Conservatorship was established to combat the problems and abuses – Good!
- However:
- Stringent requirements:
- “Gravely Disabled” or “Harm to Self or Others”
- Significant limitation of hold time
- Only Public Guardian can bring an action
- Limited the effectiveness of helping our Special Needs families



General Conservatorship

AB 1194 – Conservatorship “Free Britney” Bill (and Related Laws)

- Conservatee - Right to an Attorney
- Conservatee – Select their own Attorney
- Likely to be a Full-Blown Trial
- Any Fees out of the Conservatee’s funds must be approved in advance and must be in the best interest of the Conservatee

A General Conservatorship can be very expensive



Most Attorneys I know, are not
taking on Conservatorship
Matters



Limited Conservatorship

Adults with “Developmental Disabilities”

Cal Probate Code 1420

"Developmental disability" - disability originates before 18 years of age, continues, or can be expected to continue, indefinitely, and constitutes a substantial handicap.

“Limited” is a Terrible Name

Limits Seven Powers of the Conservatee
and grants them to the Conservator.



Conservatorship of the Person & Estate
– Usually only of the “Person”



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Limited Conservatee's Powers Granted to Conservator

- 1) The right to “determine” Residence
- 2) The right to access Confidential records and papers
- 3) To consent or withhold consent to Marriage
- 4) The right to Contract
- 5) The right to give or withhold Medical Consent
- 6) The power to control Social and Sexual contacts
- 7) The power to make Education decisions



Limited Conservatorship Process

- Lengthy list of Documents need to be completed
- Papers Filed with Court – Court Hearing Set – 3–6 months out
 - \$480 filing fee is often waived if receiving Gov't benefits
- Notification Sent to Family Members
- Doctors Evaluations of Conservatee (Capacity Declaration)
- Attorney assigned to proposed Conservatee
- Conservatee's Attorney interviews the Conservatee & Family
- Court Investigator also interviews Conservatee & Family and performs background check
- Regional Center Evaluations
- Probate Notes – Court Attorney Review & Correct Documents
- Court Hearing
- Issue Letters and Orders



Steps & Forms To Get A Conservatorship

- _____ Questionnaire Completed
- _____ Complete Required Forms
- _____ RI-PR 071 Certificate of Assignment
- _____ RI PR067A Record Check (for all adults in the home)
- _____ GC 310 Petition (and special attachment if for dementia)
- _____ MC025 to further explain 1f, 1h, 1j, 3f(1), 3f(2, an 5f
- _____ GC 312 Confidential Supplemental Information
- _____ GC 314 Confidential Conservator Screening Form
- _____ GC 348 Duties of a Conservator
- _____ RI PR 016 Probate Investigators Referral Report
- _____ RI PR 044 Declaration of Petitioner Re Trusts etc.
- _____ GC 340 Order Appointing Conservator



Steps To Get A Conservatorship – Page #2

_____ GC 350 Letters of Conservatorship

_____ GC 335 Capacity Declaration – Conservatorship (if for dementia also include form GC313)

_____ GC 320 Citation for Conservatorship

_____ GC 020 Notice of Hearing – Guardianship or Conservatorship

_____ GC020(MA) Attachment to Notice of Hearing Proof of Service

_____ Fee Waiver Request – If so, complete FW-001-GC, FW-003-GC, and FW-005-GC.

_____ Review all Forms with Client and notarize signatures. Give a copy of GC348 to proposed Conservator to take with them.

_____ File forms RI PR 071, GC 310, MC 025, GC 312, GC 314, GC 348, RI PR 016, RI PR 044, GC 340, GC 350 (signed by client), GC 335 (if completed, or at least a week prior to hearing) GC 320, GC 020 (and any Fee Waiver forms) at the Probate Clerks Office



Steps To Get A Conservatorship – Page #3

- _____ Update calendar with Hearing date, including date to check probate notes 30 days prior to hearing and all notice dates.
- _____ Mail Notice and Petition to Inland Regional Center 60-90 days prior to hearing. Address: 1365 Waterman Ave., San Bernardino, CA 92408. Alert by **phone** IRC Legal at 909-890-3403. Send **Fax** with Petition and Notice to 909-379-7600.
- _____ Advise Proposed Conservator to review the Orientation for Conservators on line at least 5 days prior to the hearing, and complete RI PR 068 and file.
- _____ Personally serve Conservatee with filed copy of GC 320, GC 310, and GC 020 at least 30 days prior to the hearing. Complete proof of service, then file.
- _____ Mail to 1st or if none to 2nd degree relatives the GC 310 and GC 020 at least 15 days prior to the hearing. Complete proof of service, then file.
- _____ If CG 335 was not filed in the original filing, assure it is filed within a week of the hearing date. (Doctor's completion of Capacity form)
- _____ Attend Hearing, then calendar all follow up activities required



Steps To Get A Conservatorship – Page #4

_____ Receive signed copies of Orders and Letters signed by the court

_____ Within 30 days after hearing, serve Notice of Conservatee's rights (GC341) on the Conservator, Conservatee, and list of Relatives

_____ Within 60 days after hearing, complete and file Determination of Conservatee's Appropriate Level of Care (GC-355)

_____ Within 90 days of the hearing, Record Letters, Complete Inventory and Appraisal (GC 040) and Notice of Filing Inventory and Appraisal and How to Object to Inventory or Appraised Value (GC 042) if Conservator of the Estate

_____ All dates and follow up activities complete, request a cancellation of 100-day hearing set by court

_____ (Remind of the continued obligation for annual accounting to be reported to the court if Conservatorship of Estate)



After Conservatorship Award

Post Hearing Documents (90 Day Documents)

More Court Investigations:

- 1 year later
- Then, every 2 years

Moving:

- In State – Notify Court of a change of address
- Out of State –
Must get Permission in advance
- allow 4-6 months.



ATTORNEY OR PARTY WITHOUT ATTORNEY: STATE BAR NO.: 190744 NAME: Jeffrey C. Nickerson FIRM NAME: Nickerson Law, A Professional Law Corporation STREET ADDRESS: 29970 Technology Dr. #203 CITY: Murrieta TELEPHONE NO.: 951-200-4921 E-MAIL ADDRESS: jeff@jeffnicklaw.com ATTORNEY FOR (name): Joshua Ryan Pope and Kelly Londenberg		FOR COURT USE ONLY FILED SUPERIOR COURT OF CALIFORNIA COUNTY OF RIVERSIDE APR 03 2025 M. Preciado	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF Riverside STREET ADDRESS: 4050 Main St. MAILING ADDRESS: CITY AND ZIP CODE: Riverside, CA 92501 BRANCH NAME: Riverside Probate Court			
CONSERVATORSHIP OF (name): Joshua Ryan Pope		CONSERVATEE	
ORDER APPOINTING ☐ SUCCESSOR PROBATE CONSERVATOR OF THE ☒ PERSON ☐ ESTATE ☒ Limited Conservatorship		CASE NUMBER: PRRI2402323	
WARNING: THIS APPOINTMENT IS NOT EFFECTIVE UNTIL LETTERS HAVE ISSUED.			

1. The petition for appointment of ☐ successor conservator came on for hearing as follows
 (check boxes c, d, e, and f or g to indicate personal presence):

a. Judicial officer (name): Magdalena Cohen

b. Hearing date APR 01 2025 Time: 8:30am

☒ Dept.: 12

☐ Room:

c. ☒ Petitioner (name): Jeffrey C. Nickerson

d. ☒ Attorney for petitioner (name):

e. ☒ Attorney for ☒ person cited ☐ the conservatee on petition to appoint successor conservator:
 (Name):
 (Address): (Telephone):

f. ☒ Person cited was ☐ present. ☐ unable to attend. ☐ able but unwilling to attend. ☐ out of state.

g. ☐ The conservatee on petition to appoint successor conservator was ☐ present. ☐ not present.

THE COURT FINDS

2. All notices required by law have been given.

3. Granting the conservatorship is the least restrictive alternative needed for the protection of the conservatee.

4. (Name): ~~Joshua Ryan Pope~~

a. ☒ is unable properly to provide for his or her personal needs for physical health, food, clothing, or shelter.

b. ☐ is substantially unable to manage his or her financial resources or to resist fraud or undue influence.

c. ☐ has voluntarily requested appointment of a conservator and good cause has been shown for the appointment.



ATTORNEY OR PARTY WITHOUT ATTORNEY (name, address, and State Bar number):

After recording return to:

Jeffrey C. Nickerson 190744
 Nickerson Law, A Professional Law Corporation
 29970 Technology Dr. #203
 Murrieta, CA 92563

TEL NO.: 951-200-4921

FAX NO. (optional):

E-MAIL ADDRESS (optional): jeff@jeffnicklaw.com

ATTORNEY FOR (name): ~~Rene M. LaNoue and Kelly Londonberg~~

SUPERIOR COURT OF CALIFORNIA, COUNTY OF Riverside

STREET ADDRESS: 4050 Main St.

MAILING ADDRESS:

CITY AND ZIP CODE: Riverside, CA 92501

BRANCH NAME: Riverside Probate Court

FOR RECORDER'S USE ONLY

CONSERVATORSHIP OF (name):

Joshua Ryan Pope

CASE NUMBER:

PRRI2402323

CONSERVATEE

LETTERS OF CONSERVATORSHIP

☒ Person ☐ Estate ☒ Limited Conservatorship

1. ☒ (Name): ~~Rene M. LaNoue and Kelly Londonberg~~ is the appointed
☐ conservator ☒ limited conservator of the ☒ person ☐ estate
 of (name): Joshua Ryan Pope
2. ☐ (For conservatorship that was on December 31, 1980, a guardianship of an adult or of
 the person of a married minor) (Name):
 was appointed the guardian of the ☐ person ☐ estate by order dated
 (specify): and is now the conservator of the ☐ person
☐ estate of (name):
3. ☒ Other powers have been granted or conditions imposed as follows:
 - a. ☒ Exclusive authority to give consent for and to require the conservatee to receive
 medical treatment that the conservator in good faith based on medical advice
 determines to be necessary even if the conservatee objects, subject to the limitations
 stated in Probate Code section 2356.
 - (1) ☐ This treatment shall be performed by an accredited practitioner of the religion whose tenets and practices call
 for reliance on prayer alone for healing of which the conservatee was an adherent prior to the establishment of
 the conservatorship.
 - (2) ☐ (If court order limits duration) This medical authority terminates on (date):
 - b. ☐ Authority to place the conservatee in a care or nursing facility described in Probate Code section 2356.5(b).
 - c. ☐ Authority to authorize the administration of medications appropriate for the care and treatment of dementia described in
 Probate Code section 2356.5(c).
 - d. ☐ Powers to be exercised independently under Probate Code section 2590 are specified in Attachment 3d (specify powers,
 restrictions, conditions, and limitations).

FOR COURT USE ONLY

FILED
 SUPERIOR COURT OF CALIFORNIA
 COUNTY OF RIVERSIDE

APR 03 2025

M. Presiado

CA1

APR 07 2025 R



Alternatives to Conservatorships Conservatorship v. POA & AHCD & Supportive Decision Making

What are they?

Which One to Choose?

“Least Restrictive” Rule



Financial Power of Attorney

- Individual names a person (usually a family member or a fiduciary) to manage finances for them.
- Individual must be Competent.
- Comprehensive and Powerful document.
- However, it is the Individual's document. The Individual creates the document and has the power to cancel the document.



Uniform Statutory Form Power of Attorney of

(California Probate Code Section 4401)

NOTICE: THE POWERS GRANTED BY THIS DOCUMENT ARE BROAD AND SWEEPING. THEY ARE EXPLAINED IN THE UNIFORM STATUTORY FORM POWER OF ATTORNEY ACT (CALIFORNIA PROBATE CODE SECTIONS 4400-4465). THE POWERS LISTED IN THIS DOCUMENT DO NOT INCLUDE ALL POWERS THAT ARE AVAILABLE UNDER THE PROBATE CODE. ADDITIONAL POWERS AVAILABLE UNDER THE PROBATE CODE MAY BE ADDED BY SPECIFICALLY LISTING THEM UNDER THE SPECIAL INSTRUCTIONS SECTION OF THIS DOCUMENT.

IF YOU HAVE ANY QUESTIONS ABOUT THESE POWERS, OBTAIN COMPETENT LEGAL ADVICE. THIS DOCUMENT DOES NOT AUTHORIZE ANYONE TO MAKE MEDICAL AND OTHER HEALTH-CARE DECISIONS FOR YOU. YOU MAY REVOKE THIS POWER OF ATTORNEY IF YOU LATER WISH TO DO SO.

I, _____, _____, CA, appoint _____, _____, CA, as my agent (attorney-in-fact) to act for me in any lawful way with respect to the following initialed subjects:

TO GRANT ALL OF THE FOLLOWING POWERS, INITIAL THE LINE IN FRONT OF (N) AND IGNORE THE LINES IN FRONT OF THE OTHER POWERS.

TO GRANT ONE OR MORE, BUT FEWER THAN ALL, OF THE FOLLOWING POWERS, INITIAL THE LINE IN FRONT OF EACH POWER YOU ARE GRANTING.

TO WITHHOLD A POWER, DO NOT INITIAL THE LINE IN FRONT OF IT. YOU MAY BUT NEED NOT, CROSS OUT EACH POWER WITHHELD.

INITIAL

- _____ (A) Real property transactions.
_____ (B) Tangible personal property transactions.



Health Care

- **Advance Health Care Directive (AHCD)**
 - Individual names someone to make Health Care Decisions, only if the disabled individual is unable to articulate his/her medical decisions.
 - Note: Individual can still say “NO”





California Advance Health Care Directive for

(California Probate Code Section 4701)

Explanation

You have the right to give instructions about your own physical and mental health care. You also have the right to name someone else to make those health care decisions for you. This form lets you do either or both of these things. It also lets you express your wishes regarding donation of organs and the designation of your primary physician. If you use this form, you may complete or modify all or any part of it. You are free to use a different form.

Part 1 of this form is a power of attorney for health care. Part 1 lets you name another individual as agent to make health care decisions for you if you become incapable of making your own decisions or if you want someone else to make those decisions for you now even though you are still capable. You may also name an alternate agent to act for you if your first choice is not willing, able, or reasonably available to make decisions for you. (Your agent may not be an operator or employee of a community care facility or a residential care facility where you are receiving care, or your supervising health care provider or employee of the health care institution where you are receiving care, unless your agent is related to you or is a coworker.)

Unless the form you sign limits the authority of your agent, your agent may make all health care decisions for you. This form has a place for you to limit the authority of your agent. You need not limit the authority of your agent if you wish to rely on your agent for all health care decisions that may have to be made. If you choose not to limit the authority of your agent, your agent will have the right to:

- (a) Consent or refuse consent to any care, treatment, service, or procedure to maintain, diagnose, or otherwise affect a physical or mental condition.



What Do You Do?

Power of Attorney (POA) – Advance Health Care Directive (AHCD)

- Easy & Inexpensive to prepare
- Powerful, but
- Individual can revoke the POA it at any time
- Individual Family Member can refuse Medical Treatment



Conservatorship

- Powerful – Conservatee has no ability to refuse or revoke
- Expensive & Time Consuming
- Can you even get one? – Especially for Mental Illness

Things to Consider

- Least Restrictive
- Mental Illness & Developmental Disability
- High Functioning – Compliant? POA & AHCD may be adequate
- Significant Disability – Can't Communicate – Limited Conservatorship



Ways to Get a Conservatorship

Do it yourself (Pro-Per) - Latin term “for oneself”

- Inexpensive (Free?) – Complicated – Do you have the time & energy?
- Riverside Courts have an excellent self-help section

Hire an Attorney

- Expensive? Finding one?

Low Income Free Support

- County Bar Association

LDA - Legal Document Assistant



Supported Decision-Making (SDM)

An Alternative to Conservatorship

A voluntary way for adults with disabilities to get help making decisions.

The Adult Remains in Control

The adult chooses trusted supporters and keeps legal decision-making rights.

Supporters Help — They Do Not Decide

They explain options, gather information, and help communicate choices.



Supported Decision-Making:

Where Can Support Help?

- Health Care, Finances, Education, Housing, and Everyday Decisions.

California Law: Welf. & Inst. Code §§ 21000–21008

- Effective 2023: Recognizes Voluntary Support while Preserving Adult Decision-Making Rights.

Agreement Requirements — § 21005

- Written agreement; adult and supporters sign before 2 disinterested witnesses or a notary.



Questions? Discussion



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Special Needs Planning

Why Plan?

1) Protect Benefits

Maximize & Coordinate Government

Assets in a Special Needs Trust are not countable.

2) Set a Life Plan Structure



Agenda

Special Needs Planning

- What is a Trust?
- Types of SNTs
- What NOT to Do!
- Drafting
- Successor Trustee
- Trustee Responsibility
- Funding
- Who Needs an SNT?

Limited Conservatorships v. PoA & AHCD

Benefits

- SSI
- MediCal
- IHSS
- Cal Fresh SNAP
- Regional Centers
- Cal-ABLE



The Best Way to Protect Benefits?



Special
Needs
Trust

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What is a Trust?

Bucket or Flower Vase

Stuff goes into the Bucket

Separate legal entity

You control it!

- Trustmaker
- Trustee
- Beneficiary



Today - Special Needs Trust



Types of SNT's

Special Needs Trust = Supplemental Needs Trust

1 1st Party SNT
Individual's Own Money
Accident - Inheritance

2 Pooled Trusts

3 3rd Party SNT
NOT the Individual's Party's Own Money
Most Common



1st Party Special Needs Trust

Individual Person's Money

- Inheritance – Personal Injury – Work Injury - Gift
- Maintains Benefits!

Payback: *Bad!*

State must be reimbursed from the trust for all Medicaid expenses on death of the Beneficiary

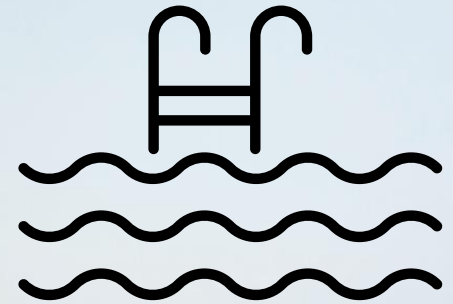
Rules:

- Beneficiary under age 65
- Established by Parent, Grandparent, Legal Guardian or Court, Beneficiary if Competent



Pooled Trust

- If funds are limited, a Pooled Trust may be a better solution
- Highly competent Beneficiary
- Run by not-for-profit
- Non-Profit Keeps remaining Funds



Check Writing Service



3rd Special Needs Trust

NOT - Individual Person's Money

NO PAYBACK!

- Maintains Benefits
- Name a Person to Manage - Trustee
- Can Include Personal Care and Advocacy
- Very Specific language required

Spending of Trust Funds – Sole Benefit Rule



Special Needs Trusts

3rd Party - Best Legal Structure to Protect
Special Needs Family Members



Funds Can Only Be Used For the Beneficiary
But – It's NOT the Beneficiary's Money!



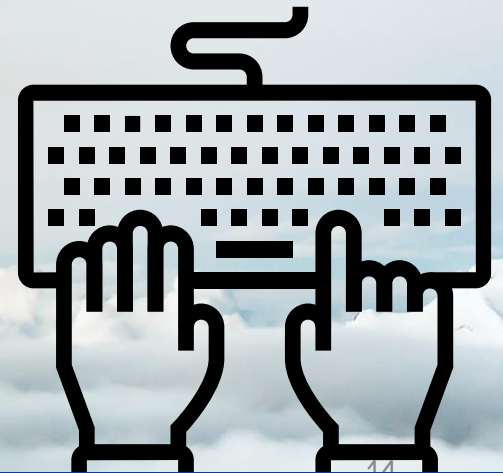
What not to Do!

- Outright Inheritance
 - Loss of SSI and Medi-Cal
- Disinheritance
- Leaving assets to brothers or sisters with request to take care of sibling
 - Subject to Creditors – Forgot to Pay the Auto Insurance
 - Commingled with Community Assets – Then Divorce
 - Death of a sibling



Drafting a Special Needs Trust

- Very Specific Rules & Language
 - Beneficiary cannot be a trustee
 - Beneficiary must never have right to revoke trust
 - NO Control
- “Stand Alone” SNT lets other family members and friends contribute
- Memorandum of Intent



Selecting a Special Needs Successor Trustee

Family Member – Business
Expertise? - Access to Advisors

One Sibling manages other Sibling's
Money?



California Professional Fiduciary
Licensed, Bondable – must be vetted



Naming an Advocate ?



Trust Administration - Responsibilities

- Invests / Manages Assets
- Distributes funds
- Keeps books
- Files tax returns
- Serve as an Advocate?
- Arranges Housing
- Arranges Care Givers
- No Personal liability – Unless acting badly
- Managing Benefits (SSI, Medi-Cal, IHSS, Etc.)
- No Tax Liability
- Trustee entitled to Compensation



Funding a Special Needs Trust

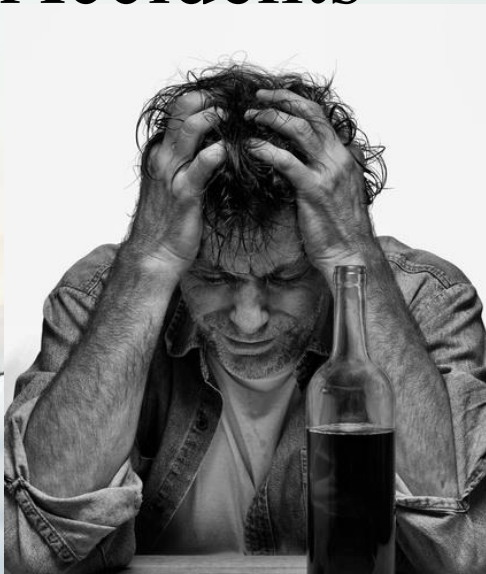
- Life Insurance Policy
- IRA
- Inheritance
- Gift

**Must specifically identify the name
of the Special Needs Trust**



Who Needs a Special Needs Trust?

- Developmental Disabilities
- Drug & Alcohol Abuse
- Mental Illness
- Accidents



Special Needs Planning Process

- Gathering information on Family Assets, Structure Dynamics, and **Benefits**
- Creating a plan that protects those **Benefits** and creates a Structure for Care & Financial Management.
- Majority of my time is Advising & Protecting **Benefits**
- You can't do Special Needs Planning without knowing **Benefits**



Public Benefits

Means Tested Public Benefits

SSI

Cal Fresh
SNAP
(Food Stamps)

Medi-Cal

Section 8
Housing

Utilities

Others?

Entitlement Public Benefits

SSDI

IHSS – In
Home Support
Services

Medicare

Regional
Centers

Education

ABLE
Accounts



Supplemental Security Income - SSI

- Monthly benefits
- To people with limited income and resources
- Blind, Age 65 or older, Qualifying Disability
- Children with disabilities may also get SSI based on parent's income.

SSI is the most Common & Complicated Benefit
Easiest to get into Trouble!





Medi-Cal

California's Medicaid program

Free or low-cost health coverage for eligible children and adults, including people with disabilities.

Why it matters for your family

Helps cover medical care, prescriptions, therapies, and equipment.

May also provide services that support living at home and in the community.

Eligibility and covered services depend on individual circumstances and program rules.

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IHSS – In Home Support Services

Serves Children & Adults with disabilities
“unable to perform activities of daily living” & “cannot remain safely in homes without help”

Very Popular Program – Very Bureaucratic

Pays Caregivers (parents) to perform Services:

- Domestic – cleaning
- Related – Meal Prep, laundry, shopping
- Personal Care – Feeding, bathing, etc.
- Transportation – Medical Appointments

“Hands On”



Cal Fresh (SNAP & Food Stamps)

Monthly benefit to assist low-income households in purchasing food to maintain adequate nutrition level.

- Citizen (with exceptions)
- Income – 200% of the Federal Poverty Level - FPL
- Resources – Generally not counted – with exception
- Work Requirements – But lots of exceptions
- 2019 – SSI recipients could receive Cal Fresh benefits.
- In 2024 – 5 million Californians received SNAP. 10%



Regional Centers

- Unique CA System of Private Non-Profit Corporations – No Other State has a similar program
- Coordinate service for those with Developmental Disabilities.
(They don't provide services)



ABLE Accounts

A Great Tool!

Another way to Help your Disabled
Family Member

**California Achieving
a Better Life
Experience (CalABLE)
for People with
Disabilities**



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ABLE Account

Achieving a Better Life Experience

- IRS Savings Program for Disabled Individual
- Does Not Count for Government Benefits
- Can be beneficiaries' money or somebody else's money (Parents)
- After Tax Deposit – **Tax-free interest savings**
- Payback? - Medi-Cal recovers all expenses from Able account –

Except California! - CAL ABLE Account ONLY

NO PAYBACK!



Limited Conservatorship

v.

Financial Power of Attorney and Health Care Directive

At age 18, The Law Presumes a Person is Competent!
Physicians and Financial people may not talk with you!



If a person is not competent to handle their own
affairs

Some action is warranted



Learn More About Nickerson Law

SCAN TO VISIT

Scan the QR code to visit our website for helpful information and ways to contact our team.

jeffreynickersonlaw.com

Estate Planning for California Families



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Questions?



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