



Aging Life Network
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October 7th 2020: Special Needs Trusts –
Benefits & Planning Tool

In the confusing world of trusts, there is one trust that you will want to know about for your aging loved one and that is the Special Needs Trust. This trust allows your loved one to remain on, or qualify for, Federal, State and other benefits while having funds in trust to assist with approved costs. If you have a sibling or are a parent of an adult with special needs, this is important for you to learn about. If you have a parent under age 65, particularly with limited resources, this will offer an option for funds to be available later while still qualifying for benefits. Join me and t

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Featured Guests

Guest Image

John Attwood, NCG | Vice President, Trust Officer

John is with First American Bank and since 2006 has held certification as a Nationally Certified Guardian (NCG). This certification qualifies him to administer Special Needs and Personal Injury Settlement Trusts. His experience includes working with clients challenged by TBI, Paraplegia, Quadriplegia, and various forms of Mental Illness and Developmental Disabilities. Mr. Attwood has served as a Trust Officer focusing on Special Needs Trust Administration for 14 years. He has a passion for utilizing trust assets to enhance the life of the person with special needs. He holds a B.A. from Oklahoma Wesleyan University and is a graduate of American Bankers Association Intermediate and Advanced

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Susan Tomita, JD

Susan K. Tomita has practiced law since 1979. She received her B.A. at Stanford University and her J.D. at the University of Santa Clara Law School where she graduated Magna Cum Laude, and is admitted to practice in New Mexico and California. Ms. Tomita is a former Chairperson of the Elder Law Section of the New Mexico State Bar Association and is a member of American College of Trust and Estate Council (ACTEC), the Special Needs Alliance, the National Academy of Elder Law Attorneys, and the New Mexico Estate Planning Council. She is a co-author of the "Handbook for Guardians and Conservators: A Practical Guide to New Mexico Law", published by the New Mexico Attorney General's Office. She

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