

# LONG ISLAND ELDER CARE, LCSW, PLLC

732 Smithtown Bypass • Suite A55 • Smithtown, NY 11787

Office: (631) 320-1070 • Fax: (631) 320-1071

longislandeldercare@yahoo.com • www.longislandeldercare.net

## COMMUNITY MEDICAID 2019 GUIDELINES

### 2019 ASSET AND INCOME ALLOWANCES

	<u>One Person</u>	<u>Two Person</u>
Income level *including \$20 unearned income disregard	\$879.00	\$1,287.00
Medicaid Resource level	\$15,450	\$22,800

### 2019 ASSET AND TRANSFER RATES FOR NURSING HOME CARE

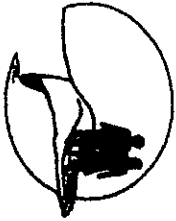
	Monthly rate
Nassau and Suffolk Counties	\$13,407
New York City	\$12,419
Northern Metropolitan Area	\$12,636

### COMMUNITY SPOUSE ALLOWANCES

Maximum Monthly Maintenance Needs Allowance (MMMMNA)	Community Spouse	\$3,160
Maximum Community Spouse Resource allowance - CSRA greater of \$74,820 or ½ of the married couple Resources, not to exceed \$123,600 (excluding residence)		\$126,420

### 2019 NEW YORK HOMESTEAD EXEMPTION

\$878.00



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## COMMUNITY MEDICAID 2020 GUIDELINES

### 2020 ASSET AND INCOME ALLOWANCES

	<u>One Person</u>	<u>Two Person</u>
Income level *including \$20 unearned income disregard	\$895.00	\$1,304.00
Medicaid Resource level	\$15,750	\$23,100

### 2020 ASSET AND TRANSFER RATES FOR NURSING HOME CARE

	Monthly rate
Nassau and Suffolk Counties	\$13,407
New York City	\$12,844
Northern Metropolitan Area	\$12,805

### COMMUNITY SPOUSE ALLOWANCES

Maximum Monthly Maintenance Needs Allowance (MMMMNA)	Community Spouse	\$3,216
Maximum Community Spouse Resource allowance - CSRA greater of \$74,820 or ½ of the married couple Resources, not to exceed \$123,600 (excluding residence)		\$128,640

### 2020 NEW YORK HOMESTEAD EXEMPTION

\$893.00

# New York Medicaid Choice



Children and Youth Evaluation Service

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ENGLISH 繁體中文 KREVOL ITALIANO 한국어 РУССКИЙ ESPAÑOL

## Ask

*Start here if you have questions*

[Contact Us](#)

## Choose

*Find a plan near you*

## Enroll

*Start the enrollment process*

# Learn about all your health plan choices

## About Us

[About](#)

[News](#)

[FAQs](#)

[Contact](#)

## Quick Links

- [Learn about your choices](#)
- [Choose your health plan](#)
- [Enroll by phone](#)
- [Brochures & lists](#)

## Contact Us

Medicaid members

Call: 1-800-505-5678, Monday - Friday, 8:30 am to 8:00 pm,  
Saturday, 10:00 am to 6:00 pm.

If you are calling about Long Term Care Plans

Call: 1-888-401-6582, Monday - Friday, 8:30 am to 8:00 pm,  
Saturday, 10: am to 6:00 pm.

Health Plan representatives

Call: Health Plans Affairs at 917-228-5600

Community Organizations

Call: Outreach Department at 917-228-5600

Maximus Appt

1-855-222-8350

## Reach Us:

1-800-505-5678  
1-888-401-6582  
(Long term care customer services)

TTY 1-888-329-1541  
Monday - Friday  
8:30 a.m. - 8:00 p.m.  
Saturday  
10:00 a.m. - 6:00 p.m.

## Quick Assist

Have questions? We're here to help. Our counselors will be glad to answer your questions. We can also help you choose a plan over the phone. All languages are spoken.

# Managed Long-Term Care Plan Directory

Name	Plan Type	Coverage	Age Requirement	Service Area by County	Mailing Address/Phone	Handbook	
Aetna Better Health	Partial	Medicaid	21 and older	Kings, New York (Manhattan), Queens, Nassau, Suffolk	55 West 125th St. Ste. 1300 New York, NY 10027 (855) 456-9126 (Partial) (855) 494-9945 (FIDA)	<a href="https://www.aetnabetterhealth.com/ny/members/mltc/handbook">https://www.aetnabetterhealth.com/ny/members/mltc/handbook</a>	<a href="https://www.aetnabetterhealth.com/ny/members/mltc/mltc-long-term-care-mltc/mltc">https://www.aetnabetterhealth.com/ny/members/mltc/mltc-long-term-care-mltc/mltc</a>
AgeWell New York	Partial	Medicaid	21 and older	Bronx, Kings, New York, Queens, Nassau, Suffolk, Westchester	1991 Marcus Ave., Ste. M201 Lake Success, NY 11042 (866) 586-8044	<a href="http://www.agewellnewyork.com/">http://www.agewellnewyork.com/</a>	<a href="http://www.agewellnewyork.com/long-term-care-mltc/mltc">http://www.agewellnewyork.com/long-term-care-mltc/mltc</a>
Empire BlueCross BlueShield HealthPlus MLTC, formerly HealthPlus, an AmeriGroup Company	Partial	Medicaid	18 and older	New York City (All boroughs)	9 Pine St., 14th Fl. New York, NY 10005 (800) 950-7679	<a href="https://mss.empireblue.com/ny/pages/mltc.aspx">https://mss.empireblue.com/ny/pages/mltc.aspx</a>	<a href="https://mediaproviders.empireblue.com/ny/pages/mltc/mltc-more.aspx">https://mediaproviders.empireblue.com/ny/pages/mltc/mltc-more.aspx</a>
ArchCare Community Life	Partial	Medicaid	21 and older	(All NYC Boroughs), Putnam, Westchester	33 Irving Place, 11th Fl. New York, NY 10003 (855) 467-9351	<a href="https://www.archcare.org/">https://www.archcare.org/</a>	<a href="https://www.archcare.org/mltc/members">https://www.archcare.org/mltc/members</a>
ArchCare Senior Life	PACE	Medicaid Medicare Private Pay	55 and older	Bronx, New York, Richmond, Westchester	1432 Fifth Ave. New York, NY 10035 (866) 263-9083	<a href="https://www.archcare.org/">https://www.archcare.org/</a>	<a href="https://www.archcare.org/mltc/members">https://www.archcare.org/mltc/members</a>
Catholic Health-LIFE	PACE	Medicaid Medicare Private Pay	55 and older	Erie	55 Melroy Ave. Lackawanna, NY 14218 (855) 671-3341 (716) 819-5064		
Central Light Healthcare PACE	PACE	Medicaid Medicare Private Pay	55 and older	NYC (All boroughs), Nassau, Suffolk, Westchester	1250 Waters Place Tower 1, Ste. 602 Bronx, NY 10461 (877) 226-8500	<a href="https://centershealthcare.com/centersplan/plans/mltc">https://centershealthcare.com/centersplan/plans/mltc</a>	<a href="https://centershealthcare.com/centersplan/plans/mltc-term-care-materials">https://centershealthcare.com/centersplan/plans/mltc-term-care-materials</a>
Centers Plan for Healthy Living	Partial	Medicaid	21 and older	NYC (All boroughs), Erie, Nassau, Suffolk, Niagara, Rockland, Westchester	75 Vanderbilt Ave. 7th Fl. Staten Island, NY 10304 (855) 270-1600 (Partial) (800) 466-2745 (FIDA)		
Centers Plan for FIDA Care Complete	FIDA	Medicaid Medicare	21 and older	Kings, Queens, Bronx, New York, Richmond	1302 Main St. Niagara Falls, NY 14301 (888) 303-4333 (716) 285-8248		
Complete Senior Care	PACE	Medicaid Medicare Private Pay	55 and older	Niagara			

Eddy SeniorCare	PACE	Medicaid Medicare Private Pay	55 and older	in all of county), Schenectady (Most of county)	504 State St. Schenectady, NY 12305 (518) 382-3290	<a href="https://www.elderplan.org/homefirst/member-materials/">https://www.elderplan.org/homefirst/member-materials/</a>	<a href="https://www.elderplan.org">https://www.elderplan.org</a>
Elderplan, Inc. MAP	MAP	Medicaid Medicare	18 and older	NYC (All boroughs), Nassau, Westchester	6323 Seventh Ave. Brooklyn, NY 11220 (866) 362- 4265(MAP) (866) 353-4681 (Partial) (855) 462-3167 (FIDA)	<a href="https://www.elderplan.org/homefirst/">https://www.elderplan.org/homefirst/</a>	<a href="https://www.elderplan.org">https://www.elderplan.org</a>
HomeFirst, a product of Elderplan, Inc.	Partial	Medicaid	18 and older	NYC (All boroughs), Dutchess, Nassau, Orange, Putnam, Rockland, Suffolk, Sullivan, Ulster, Westchester			
Elderplan FIDA Total Care	FIDA	Medicaid Medicare	21 and older	Kings, Queens, Bronx, New York, Richmond, Nassau		<a href="https://www.elderwoodhealthplan.com/member-resources/">https://www.elderwoodhealthplan.com/member-resources/</a>	<a href="https://www.elderwoodhe">https://www.elderwoodhe</a>
Elderwood Health Plan	Partial	Medicaid	21 and older	Erie, Genesee, Monroe, Niagara, Orleans, Wyoming	500 Seneca St. Buffalo, NY 14204 (866) 843-7526		<a href="https://www.elderwoodhe">https://www.elderwoodhe</a>
Evercare Choice	Partial	Medicaid	18 and older	Dutchess, Orange, Rockland	31 Cerone Place Newburgh, NY 12550 (877) 255-3678	<a href="https://www.evercare.org/services/evercare-choice/handbook/">https://www.evercare.org/services/evercare-choice/handbook/</a>	<a href="https://www.evercare.org">https://www.evercare.org</a>
Extended MLTC, LLC	Partial	Medicaid	21 and older	NYC (All boroughs), Nassau, Suffolk	360 West 31st St., Ste. 304 New York, NY 10001 (855) 299-6492	<a href="http://extendedmltc.org/files/MLTC_Member_Handbook_092017.pdf">http://extendedmltc.org/files/MLTC_Member_Handbook_092017.pdf</a> <a href="http://extendedmltc.org/">http://extendedmltc.org/</a>	
Fallon Health Weinberg MLTC	Partial	Medicaid	21 and older	Erie and Niagara	461 John James Audubon Pkwy Amherst, NY 14228 (866) 882-8185 (716) 250-3100	<a href="http://www.fallonweinberg.org/en/Plans/MLTC/member-materials.aspx">http://www.fallonweinberg.org/en/Plans/MLTC/member-materials.aspx</a>	<a href="http://www.fallonweinber">http://www.fallonweinber</a>
Fallon Health Weinberg PACE	PACE	Medicaid Private Pay	55 and older	Erie	461 John James Audubon Pkwy Amherst, NY 14228 (716) 810-1895 (855) 665-1113		
Fidelis Care at Home	Partial	Medicaid	18 and older	NYC (All boroughs), all Upstate counties	95-25 Queens Blvd Rego Park, NY 11374	<a href="https://www.fideliscare.org/members">https://www.fideliscare.org/members</a>	<a href="https://www.fideliscare.org">https://www.fideliscare.org</a>
Fidelis Medicaid Advantage Plus	MAP	Medicaid Medicare	18 and older	NYC (All boroughs), Albany, Montgomery, Rensselaer, Schenectady	(800) 688-7422 (Partial) (877) 533-2404 (MAP) (800)247-1447 (FIDA)	<a href="https://www.fideliscare.org/en-us/members/memberhandbooks.aspx">https://www.fideliscare.org/en-us/members/memberhandbooks.aspx</a>	<a href="https://www.fideliscare.org">https://www.fideliscare.org</a>
Hamaspiik Choice, Inc.	Partial	Medicaid	18 and older	Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster	58 Rt. 59, Ste. 1 Monsey, New York 10952 (855) 552-4642	<a href="https://www.hamaspiikchoice.org/Member-Handbook.pdf">https://www.hamaspiikchoice.org/Member-Handbook.pdf</a>	<a href="https://www.hamaspiikchoic">https://www.hamaspiikchoic</a>
HealthFirst CompleteCare	MAP	Medicaid Medicare	18 and older	NYC (All boroughs), Nassau, Westchester	100 Church St. 18th Fl. New York, NY 10007 (888)260-1010	<a href="https://healthfirst.org/members/plan-materials/2018-medicaid-plan-materials/">https://healthfirst.org/members/plan-materials/2018-medicaid-plan-materials/</a>	<a href="https://www.providerlooku">https://www.providerlooku</a>

Healthfirst AbsoluteCare FIDA	FIDA	Medicaid Medicare	21 and older	Bronx, New York, Richmond, Nassau, Westchester	(MAP) (855) 675-7630 (FIDA)	<a href="https://circlcare.nyc.org/Resources/tabid/119/Default.aspx">https://circlcare.nyc.org/Resources/tabid/119/Default.aspx</a>	<a href="https://circlcare.nyc.org/">https://circlcare.nyc.org/</a>	
Circle Care	Partial	Medicaid	18 and older	Bronx, New York, Ontario, Orleans, Oswego, Otsego, Schuyler, Seneca, Steuben, Tioga, Tompkins, Wayne, Wyoming, Yates	860 Hard Rd. Webster, NY 14580 (844) 424-7253			
Independent Living for Seniors d/b/a ElderONE	PACE	Medicaid Medicare Private Pay	55 and older	Monroe, Ontario, Wayne	2066 Hudson Ave. Rochester, NY 14617 (585) 922-2800 (855) 457-4636 (Main)		<a href="http://www.integraplans.org/ds/healthbookv3.5.pdf">http://www.integraplans.org/ds/healthbookv3.5.pdf</a>	<a href="http://directory.integraplans.org/">http://directory.integraplans.org/</a>
Integra MLTC, Inc.	Partial	Medicaid	18 and older	NYC (All boroughs), Nassau, Suffolk, Westchester	1981 Marcus Avenue, Ste. 100 Lake Success, NY 11042 (855) 800-4683		<a href="https://www.kaloshhealth.org/mltc/member-resources/">https://www.kaloshhealth.org/mltc/member-resources/</a>	<a href="https://www.kaloshhealth.org/">https://www.kaloshhealth.org/</a>
Kalos Health	Partial	Medicaid	18 and older	Chautauqua, Erie, Genesee, Monroe, Niagara, Orleans	2424 Niagara Falls Blvd. Ste 400 Niagara Falls, NY 14304 800-894-2464		<a href="https://www.metroplus.org/get-the-health-insurance-health-plans/metroplus-managed-care">https://www.metroplus.org/get-the-health-insurance-health-plans/metroplus-managed-care</a>	<a href="https://www.metroplus.org/plans/metroplus-managed-care">https://www.metroplus.org/plans/metroplus-managed-care</a>
MetroPlus MLTC	Partial	Medicaid	21 and older	Bronx, Kings, New York, Queens	160 Water St. New York, NY 10038		<a href="https://www.metroplus.org/plans/metroplus-managed-care">https://www.metroplus.org/plans/metroplus-managed-care</a>	<a href="https://www.metroplus.org/plans/metroplus-managed-care">https://www.metroplus.org/plans/metroplus-managed-care</a>
Montefiore Diamond Care MLTC	Partial	Medicaid	21 and older	Bronx and Westchester	(855) 355-6582	<a href="https://www.metroplus.org/plans/metroplus-managed-care">https://www.metroplus.org/plans/metroplus-managed-care</a>	<a href="https://www.metroplus.org/plans/metroplus-managed-care">https://www.metroplus.org/plans/metroplus-managed-care</a>	
Nascentia Health	Partial	Medicaid	18 and older	Albany, Allegany, Broome, Cattaraugus, Cayuga, Chautauqua, Chemung, Chenango, Clinton, Columbia, Cortland, Delaware, Erie, Essex, Franklin, Fulton, Genesee, Greene, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Madison, Monroe, Montgomery, Niagara	1050 W. Genesee St. Syracuse, NY 13204 (315) 477-9500 (888) 477-4663		<a href="http://www.montefiore.org">http://www.montefiore.org</a>	

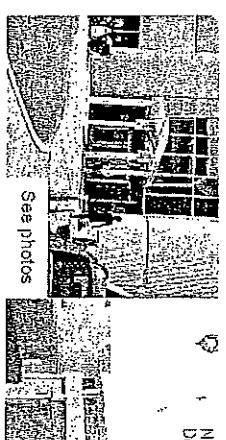
					Onondaga, Ontario, Orleans, Oswego, Rensselaer, St. Lawrence, Saratoga, Schoenectady, Schuylar, Seneca, Steuben, Tioga, Tompkins, Warren, Washington, Wayne, Wyoming, Yates				
PAGE CNY	PAGE	Medicaid Medicare Private Pay	55 and older	Onondaga	100 Malta Lane North Syracuse, NY 13212 (888) 728-7223				
Partners Health Plan	FIDA- IDD	Medicaid Medicare	21 and older	Bronx, Kings, Nassau, New York, Queens, Richmond, Rockland, Suffolk, Westchester	655 Third Ave. New York, NY 10017 (355) 747-5483				
Prime Health Choice LLC	Partial	Medicaid	21 and older	Albany, Dutchess, Orange, Putnam, Rockland, Warren, Washington	3125 Emmons Ave. Brooklyn, NY 11235 (855) 777-4630	<a href="http://primethealthchoice.com/">http://primethealthchoice.com/</a>		<a href="http://primethealthchoice.ec">http://primethealthchoice.ec</a>	
Riverspring at Home	Partial	Medicaid	18 and older	NYC (All boroughs), Nassau, Suffolk, Westchester	94 West 225th St., 2nd Fl. Bronx, NY	<a href="https://www.riverspringathome.org/">https://www.riverspringathome.org/</a>		<a href="http://www.riverspringatho">http://www.riverspringatho</a>	
Riverspring FIDA	FIDA	Medicaid Medicare	18 and older	Kings, Queens, Bronx, New York, Richmond, Nassau, Westchester	10463 (800) 370-3600 (Partial) (800) 950-9000 (FIDA)				
Senior Health Partners A Healthfirst Company	Partial	Medicaid Private Pay	21 and older	NYC (All boroughs) Nassau, Westchester	100 Church St., 18th Fl. New York, NY 10007 (866) 585-9280	<a href="https://healthfirst.org/health-insurance/senior-health-partners/">https://healthfirst.org/health-insurance/senior-health-partners/</a>		<a href="https://www.providerokk">https://www.providerokk</a>	
Senior Network Health, LLC	Partial	Medicaid Private Pay	18 and older	Herkimer and Oneida	1650 Champlin Ave. Utica, NY 13502 (888) 355-4764 (315) 624-4545				
Senior Whole Health of New York MLTC	Partial	Medicaid	21 and older	Bronx, Kings, New York, Queens, Westchester	111 Broadway, Ste. 1505 New York, NY				
Senior Whole Health of New York MAP	MAP	Medicaid Medicare	65 and older	Bronx, Kings, Nassau, New York, Queens, Westchester	10006 (877) 353-0185 (Partial & MAP) (844) 861-3432 (FIDA)				
Senior Whole		Medicaid		Bronx, Kings, New					

Health FIDA	FIDA	Medicare	21 and older	York, Queens	519 North Union St. Olean, NY 14760 (716) 379-8474 (866) 939-8613			
Total Senior Care, Inc.	PACE	Medicaid Medicare Private Pay	55 and older	Allegany, Cattaraugus, Chautauqua				
United Healthcare Personal Assist	Partial	Medicaid	18 and older	NYC (All boroughs)	77 Water St., 14th Fl. New York, NY 10005 (877) 512-9354			
VillageCare/MAX	Partial	Medicaid	18 and older	Bronx, Kings, New York, Queens	112 Charles St. 2nd Fl. New York, NY 10014 (800) 469-6292			
VillageCare MAX Medicare Total Advantage	MAP	Medicaid Medicare	18 and older	NYC (All boroughs), Albany, Columbia, Delaware, Dutchess, Erie, Fulton, Greene, Herkimer, Madison, Monroe, Montgomery, Nassau, Oneida, Onondaga, Orange, Otsego, Putnam, Rensselaer, Rockland, Saratoga, Schoenady, Schoharie, Suffolk, Sullivan, Ulster, Warren, Washington, Westchester	1250 Broadway, 11th Fl. New York, NY 10001 (866) 783-1444 (FIDA)			
VNSNY CHOICE Managed Long Term Care	Partial	Medicaid	18 and older	NYC (All boroughs), Nassau, Suffolk, Westchester				
VNSNY CHOICE Total	MAP	Medicaid Medicare	18 and older	Kings, Queens, Bronx, New York, Richmond, Nassau				
VNSNY CHOICE FIDA Complete	FIDA	Medicaid Medicare	21 and older	*approved to operate but not yet live in Suffolk and Westchester counties				
Wellcare Advocate MLTC	Partial	Medicaid	18 and older	NYC (All boroughs), Albany, Erie, Orange, Nassau, Rockland, Suffolk, Ulster, Westchester	One New York Plaza, 15th Floor, New York, NY 10004 (866) 661-1232 (Partial)			
					<a href="https://www.wellcare.com/New-York/Members/Medicaid-Plans/WellCare-Advocate-Managed-Long-Term-Care">https://www.wellcare.com/New-York/Members/Medicaid-Plans/WellCare-Advocate-Managed-Long-Term-Care</a>			<a href="https://www.wellcare.com/Plans/WellCare-Advocate-Plans/Members/Medicaid-Plans/WellCare-Advocate-Managed-Long-Term-Care">https://www.wellcare.com/Plans/WellCare-Advocate-Plans/Members/Medicaid-Plans/WellCare-Advocate-Managed-Long-Term-Care</a>
								<a href="https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials">https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials</a>
								<a href="https://www.villagecaremax.org/mltfc-for-members/member-handbook">https://www.villagecaremax.org/mltfc-for-members/member-handbook</a>
								<a href="https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials">https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials</a>
								<a href="https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials">https://www.vnsnychoice.org/for-our-members/plans-benefits/managed-long-term-care/member-materials</a>



# 60 Charles Lindbergh Blvd #160, Uniondale, NY 11553

Nassau County Department of Social Services, Address



See photos

## Social Services | Nassau County, NY - Official Website

<https://www.nassaucounty.ny.gov/1895/Social-Services>

Nassau County DSS selected as Nassau NASW 2017 Agency of the Year ... The Nassau County Department of Social Services is committed to strengthening and preserving families by providing financial ... Toll free phone: 1-855-355-5777 ... View All / Quicklinks.aspx. DSS Home · Directions · Directory · What We Do.

Directory Medicaid Housing & Homeless Prevention · Supplemental Nutrition ...

## Directory | Nassau County, NY - Official Website

<https://www.nassaucounty.ny.gov/2684/Directory/>

Directory: Home · Departments · Social Services; Directory ... Child Protective ServicesCommunity / School Liaison ... Customer Service Unit, 516-227-7474.

### People also ask

How do I apply for Medicaid in Nassau County?

What does the Dept of Social Services do?

How do I apply for food stamps in Long Island?

How do I apply for food stamps in Suffolk County NY?

## Medicaid | Nassau County, NY - Official Website

<https://www.nassaucounty.ny.gov/1923/Medicaid>

Supplemental Security Income (SSI) is a federal assistance program for the aged (65 and over), blind, and disabled which is administered through local Social ...

## Nassau County Department of Social Services (DSS) (HHS ...

<https://nyconnects.ny.gov/.../nassau-county-department-of-social-services-...>

On Oct 20, 2015 - Nassau County Department of Social Services (DSS) (HHS), Uniondale, NY.

Learn More ... Provider Address:60 Charles Lindbergh Boulevard, Nassau, Uniondale, NY, 11553. [Business] ... NY, 11553. Provider Telephone:(516)227- 8519 ... Agencies - App

Directory · Counties · Events · Programs · Services.

## nassau county department of social services - 211 Long Island

<https://211longisland.comunities.org/zfp/profile/agency/id/153813>

Jan 18 2015 - Mailing Address 1, 60 Charles Lindbergh Blvd, Mailing City, State, Zip, Uniondale, NY 11553. Main Phone, (516)227-8000. Web Address ...

## Nassau County Department of Social Services Uniondale Family ...

[https://www.financialhelpresources.com/.../nassau\\_county\\_department\\_of\\_...](https://www.financialhelpresources.com/.../nassau_county_department_of_...)

Nassau County Department of Social Services Uniondale, Website: <http://www.nassaucounty.ny.gov/> Click to view street address. Uniondale, NY - 11553

## Nassau County Department of Social Services

Website Directions Save

1.9 126 Google reviews

Department of social services in East Garden City,

Address: 60 Charles Lindbergh Blvd #160, Union

Hours: Open · Closes 4PM

Phone: (516) 227-8519

Suggest an edit · Own this business?

Know this place? Answer quick questions

### Questions & answers

Q: I was secheuled to have a phone recertification no one called has this happened to anyone else ?

A: I was supposed to get a call from the recertificat came what or who do I contact?

(1 more answer)

See all questions (59)

Send to your phone

Reviews Write a review

"The people that work here are mostly 'igno trash.'"

"They gave my niece such a run around..."

"This place should be shut down."

View all Google reviews

### People also search for

Belthany House	Nassau Haven Social Services	Long Island Housing...	Suffolk County Social S...
Howell House	Howell House	Howell House	Howell House
Howell House	Howell House	Howell House	Howell House

COUNTY OF SUFFOLK



STEVE LEVY  
SUFFOLK COUNTY EXECUTIVE

GREGORY J. BLASS  
COMMISSIONER

DEPARTMENT OF SOCIAL SERVICES

ZIP CODE LIST

MEDICAID EAST  
RIVERHEAD CENTER  
893 East Main Street - Millbrook Office Campus  
Riverhead, New York 11901

New Applications (631) 852-3710

Open Cases (631) 852-3570

11930 Amegansett	11949 Manorville	11956 Shelter Island Heights
11931 Aquebogue	11950 Mastic	11967 Shirley
11933 Baiting Hollow/Calverton	11951 Mastic Beach	11786 Shoreham
11713 Bellport	11952 Mattituck	11789 Sound Beach
11932 Bridgehampton	11953 Middle Island	11970 South Jamesport
11719 Brookhaven	11954 Moritauk	11968 Southampton
11934 Center Moriches	11955 Moriches	11971 Southold
11935. Cutchogue	11956 New Suffolk	11972 Speonk
11728 Davis Park	11957 Orient	11790 Stony Brook
11937 East Hampton	11958 Peconic	11794 Stony Brook University
11939 East Marion	11959 Quogue	11973 Upton
11940 East Moriches	11960. Remsenburg	11792 Wading River
11942 East Quogue	11961 Ridge	11975 Wainscott
11941 Eastport	11901 Riverhead	11976 Water Mill
06390 Fishers Island	11778 Rocky Point	11977 Westhampton
11944 Greenport	11963 Sag Harbor	11978 Westhampton Beach
11946 Hampton Bays	11932 Sagaponack	11980 <del>Yaphank</del>
11947 Jamesport	11733 Setauket	
11948 Laurel	11964 Shelter Island	

MEDICAID WEST  
SMITHTOWN CENTER

Street Address  
200 Wireless Boulevard  
Hauppauge, New York 11788-8900

New Application (631) 853-8730  
Open Cases (631) 854-0555

Mailing Address  
P.O. Box 18100  
Hauppauge, NY 11788-8900

11701 Amityville	11735 Farmingdale	11766 Mount Sinai
11702 Babylon	11738 Farmingville	11767 Nesconset
11706 Bay Shore	11739 Great River	11703 North Babylon
11705 Bayport	11740 Greenlawn	11768 Northport
11715 Blue Point	11788 Hauppauge	11769 Oakdale
11716 Bohemia	11741 Holbrook	11770 Ocean Beach
11717 Brentwood	11742 Holtsville	11772 Patchogue
11718 Brightwaters	11743 Huntington	11777 Port Jefferson
11720 Centereach	11746 Huntington Station	11776 Port Jefferson Station
11721 Centerport	11749 Islandia	11779 Ronkonkoma
11722 Central Islip	11751 Islip	11780 Saint James
11724 Cold Spring Harbor	11752 Islip Terrace	11782 Sayville
11725 Commack	11754 Kings Park	11784 Selden
11726 Copiague	11755 Lake Grove	11787 Smithtown
11727 Coram	11757 Lindenhurst	11704 West Babylon
11729 Deer Park	11763 Medford	11795 West Islip
11730 East Islip	11747 Melville	11796 West Sayville
11731 East Northport	11764 Miller Place	11798 Wheatley Heights
11734 Fair Harbor		11798 Wyandanch

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- Getting Started
- Research and Advocacy Tips
- Federal Health Reform
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- Getting Started
- Overview
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- Financial Eligibility
- Home Care
- Immigrant Access
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  - List of Pooled SNTs in ...
  - How to use a pooled S...
  - Legal Authorities Relat...
  - Medicaid Alerts & Oth...
- Family Health Plus
- Child Health Plus
- Medicare Part D
- Medicare Savings Program
- Medicaid
- Private Insurance
- EPIC
- Long Term Care Insurance
- Uninsured
- Immigrant Access
- Language and Disability Acc...
- HIPAA
- Health Care Decisionmaking
- For Site Authors
- Veterans

[NYNLC Online Resources / Home / Medicaid / Supplemental Needs Trusts / List of Pooled SNTs in New York State](#)

## List of Pooled SNTs in New York State

This is an unofficial list of non-profit organizations in New York State that offer pooled Supplemental Needs Trusts (or similar services) to people with disabilities. We do not claim that this is an exhaustive list; there may be other pooled trusts in the state of which we are unaware. In addition, the specifics about each trust may not be up to date, so the best source of information is to contact the trust organization directly. Please let us know if you find any corrections. For more information on Pooled Income Trusts, see our fact sheets in [English](#) and [Spanish](#).

Views: 170455

Posted: 01 Aug 2008  
by David Silva (New York Legal Assistance Group)

Updated: 08 Mar 2019  
by Michael Connors (New York Legal Assistance Group)

Name and Contact Info	Comments	Accepts monthly income to eliminate Medicaid spend-down
<p><b>Adults and Children with Learning &amp; Developmental Disabilities, Inc. (AALD)</b> 807 South Oyster Bay Road Bethpage, NY 11714 <a href="http://www.aald.org/">http://www.aald.org/</a></p> <p>Colleen Crispino 516-822-0028 x 138 <a href="mailto:crispinoc@aald.org">crispinoc@aald.org</a></p> <p>AHRC NYC Foundation 83 Maiden Lane New York, NY 10038 (212) 780-2690 Email: <a href="mailto:info@ahrcnycfoundation.org">info@ahrcnycfoundation.org</a> <a href="http://www.ahrcnycfoundation.org/">http://www.ahrcnycfoundation.org/</a></p>	<p>Trust A - third-party trust</p> <p>Trust B - self-settled trust</p> <p>Community Trust I for Persons with Disabilities</p> <ul style="list-style-type: none"> <li>• Third-party trust</li> <li>• Minimum contribution: \$10,000</li> <li>• Annual fee of &lt;1%</li> </ul> <p>Community Trust II</p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Minimum contribution: \$10,000</li> <li>• Annual fee of &lt;2%</li> </ul>	<p>No</p> <p>No</p>
<p><b>Camp Hill Resident's Trust</b> 317 Church Street Phoenixville, PA 19460 (610) 291-5079 Email: <a href="mailto:info@camphilltrust.com">info@camphilltrust.com</a> <a href="http://www.camphilltrust.com/">http://www.camphilltrust.com/</a></p> <p><b>Catholic Family Center</b> 30 N. Clinton Avenue Rochester, NY 14604 (585) 232-1840 x4003 / x4022 <a href="http://www.cfcrochester.org/">http://www.cfcrochester.org/</a></p>	<p>The minimum for starting a CRT account is \$ 15,000. However, an initial deposit of as little as \$3,000 may open an account with the remainder of the \$ 15,000 to be deposited within two years. Additional contributions, in amounts of \$ 100 or more, can be made at any time to an established CRT account.</p> <ul style="list-style-type: none"> <li>• Formerly Family Service of Rochester</li> <li>• They do not operate a pooled trust, but will serve as trustee for individual SNTs</li> <li>• This might be a good option for individuals under 65 who want to establish an individual SNT, but where the trust corpus is too small to afford a for-profit institutional trustee</li> <li>• They can serve as trustee for lump sums, but also for monthly excess income</li> <li>• The trust agreement must specify that CFC receives the</li> </ul>	<p>No</p> <p>Yes</p>

<p>Center for Disability Rights, Inc. 497 State Street Rochester, NY 14608 <u>CDR Pooled Trust Info &amp; Forms</u> Amanda Flannery or Mirta Arroyo <a href="mailto:marroyo@cdmvs.org">marroyo@cdmvs.org</a> Ph: (585) 546-7510 Fax: (585) 546-7567 / (585) 546-7560</p>	<ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• No minimum balance</li> <li>• \$240 start-up cost (includes \$200 enrollment fee plus \$20 monthly fee and \$20 minimum deposit)</li> <li>• \$20 monthly fee (covers up to 4 disbursements per month; \$10 fee for each additional disbursement)</li> <li>• \$50 annual accounting fee</li> </ul>	<p>Yes</p>
<p>Community Living Corporation (CLC) 600 Bedford Road Mt. Kisco, NY 10549 (914) 241 2076 Email: <a href="mailto:clcfoundation@optonline.net">clcfoundation@optonline.net</a> <a href="http://www.clcpooledtrust.org">http://www.clcpooledtrust.org</a></p>	<p><b>Pooled Trust 1</b> Pooled Trust 1 is a third-party SNT, established with funds provided by a family member or friend.</p> <ul style="list-style-type: none"> <li>• Minimum Deposit: \$10,000</li> <li>• One-time enrollment fee \$200</li> <li>• \$1,000 annual fee for accounts under \$25,000</li> <li>• For accounts over \$25,000, annual fee of not less than \$1,000 to be negotiated with trustee</li> </ul> <p><b>Pooled Trust 2</b> Pooled Trust 2 is a self-settled SNT, established with funds provided by the beneficiary.</p> <ul style="list-style-type: none"> <li>• Minimum Deposit: \$5,000</li> <li>• One-time enrollment fee \$250</li> <li>• \$1,000 annual fee for accounts under \$50,000</li> <li>• For accounts over \$50,000, additional annual fee of 1% of balance in excess of \$50,000</li> </ul>	<p>Yes</p>
<p>Disabled and Alone / Life Services for the Handicapped, Inc. Mailing address: PO Box 340 New Hyde Park, NY 11040-0340 Office Address: 1441 Broadway, 6TH Floor PMB #9135 NY NY 10018-1905 Ph: (212) 532-6740 / (800) 996-0066 Fax: (212) 532-3588 <a href="http://www.disabledandalone.org/">http://www.disabledandalone.org/</a></p>	<ul style="list-style-type: none"> <li>• Third-party trust</li> <li>• Minimum deposit: \$100,000</li> <li>• First-party trust</li> <li>• Minimum deposit \$20,000, but annual fee \$750 if under \$100,000, plus 1% of balance for accounts up to \$1 Mill, with smaller % for part exceeding \$1 Mill, plus co-trustee and tax preparation fees</li> </ul>	<p>Yes if have 1st party trust established with minimum deposit</p>
<p><b>Future Care Community Pooled Trust</b> (A partnership of Al Sigt Community of Agencies, Lifespan and the Arc of Monroe) 1000 Elmwood Avenue Rochester, NY 14620 T: 585-402-7840 Ext 2 <a href="http://www.futurecareplanning.org/">http://www.futurecareplanning.org/</a></p>	<p><b>Must Reside in Monroe County or surrounding counties to be able to join this trust</b></p> <p><b>1st Party Lump Sum Pooled Trust</b></p> <ul style="list-style-type: none"> <li>• \$200 enrollment fee</li> <li>• \$3000 minimum opening deposit (\$2000 if on SSI)</li> <li>• 0.95% annually for investment services</li> <li>• 0.75% annually for administrative fee</li> <li>• \$50 annual audit fee</li> <li>• \$30.00 per month additional fee if trust is used for monthly disbursements</li> </ul> <p><b>1st Party Spend Down Pooled Trust</b></p> <ul style="list-style-type: none"> <li>• \$200 enrollment fee</li> <li>• \$100 Minimum balance</li> <li>• \$30 per month includes 4 disbursements (\$5 per additional disbursement)</li> </ul>	<p>Yes (1st Party Spend Down Pooled Trust)</p>

	<ul style="list-style-type: none"> <li>• \$50 annual audit fee</li> </ul> <p><b>3rd Party Pooled Trust</b></p> <ul style="list-style-type: none"> <li>• \$5000 minimum opening deposit</li> <li>• Please call for fees</li> </ul>	
<p><b>IKTS Pooled Trust</b></p> <p>3011 Avenue K Brooklyn, NY 11210 Phone: (718) 475-5000 FAX: (718) 475-5010 Email: <a href="mailto:info@ikstrust.org">info@ikstrust.org</a> <a href="http://ikstrust.org/">http://ikstrust.org/</a></p>	<ul style="list-style-type: none"> <li>• \$250 enrollment fee</li> <li>• Monthly fee of 10% of required monthly deposit (minimum \$30, maximum \$200)</li> <li>• Annual renewal fee of \$100</li> <li>• Monthly contributions can be made by ACH direct debit from bank account</li> <li>• No minimum balance</li> <li>• No minimum funding</li> </ul>	Yes
<p><b>LCG Community Trust</b> LCG Community Services, Inc 14 Mount Hope Place Bronx, NY 10453-6102 (718) 466-2200 Email: <a href="mailto:info@lccgs.org">info@lccgs.org</a> <a href="http://www.lccgs.org/">http://www.lccgs.org/</a></p>	<p><b>Community Trust I – Self-Directed Asset Trust</b></p> <ul style="list-style-type: none"> <li>• \$25,000 minimum contribution within 12 years of enrollment</li> <li>• Enrollment fee of 1% of initial deposit (minimum \$250)</li> <li>• Monthly administrative fee of 2% of funds on deposit (minimum \$42)</li> <li>• Monthly brokerage fee of 0.042%</li> <li>• Annual renewal fee of \$100</li> <li>• Annual audit and tax return fee of \$100</li> <li>• Can designate remainder beneficiaries to receive no more than 50% of corpus remaining on disabled beneficiary's death</li> </ul> <p><b>Community Trust II – Third Party Asset Trust</b></p> <ul style="list-style-type: none"> <li>• \$25,000 minimum contribution within 12 years of enrollment</li> <li>• \$250 enrollment fee</li> <li>• Monthly administrative fee of 2% of funds on deposit (minimum \$42)</li> <li>• Monthly brokerage fee of 0.042%</li> <li>• Annual renewal fee of \$100</li> <li>• Annual audit and tax return fee of \$100</li> <li>• Can designate remainder beneficiaries to receive no more than 50% of corpus remaining on disabled beneficiary's death</li> </ul>	Yes (Community Trust II and III)
	<p><b>Community Trust III – Medicaid Spend-Down Trust</b></p> <ul style="list-style-type: none"> <li>• Minimum monthly deposit: \$500</li> <li>• \$250 enrollment fee</li> <li>• Monthly administrative fee of 6.5% of required monthly deposit (minimum \$42.50)</li> <li>• Annual renewal fee of \$100</li> <li>• Annual audit and tax return fee of \$100</li> <li>• All funds remaining in the trust at beneficiary's death are retained by trustee organization</li> </ul>	
<p><b>Life's WORC Trusts</b> 1501 Franklin Avenue PO Box 8165 Garden City, NY 11530 516-741-9000 ext. 225 516-348-7878 Fax: (516) 302-1802 Email: <a href="mailto:trustservices@lifesworc.org">trustservices@lifesworc.org</a> <a href="http://www.lifesworctrust.org/">http://www.lifesworctrust.org/</a></p>	<p><b>Self-Settled Trust (Community Trust 1)</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Minimum deposit: \$500</li> <li>• One-time non-refundable enrollment fee of \$250</li> <li>• Annual fees: <ul style="list-style-type: none"> <li>◦ Up to \$20,000 – 5% of Account Balance;</li> <li>◦ \$20,000 to \$50,000 – \$1000;</li> <li>◦ \$50,000 and above - additional 1% of balance over \$50,000</li> </ul> </li> <li>• Annual accounting fee of \$100</li> <li>• At beneficiary's death the balance is retained by the trust</li> </ul> <p><b>Third-Party Pooled Trust (Community Trust 2)</b></p>	Yes (Community Trust 3 only)

	<ul style="list-style-type: none"> <li>• Third-party/trust</li> <li>• Minimum deposit: \$10,000</li> <li>• One-time non-refundable enrollment fee of \$250</li> <li>• Annual fees: <ul style="list-style-type: none"> <li>◦ Up to \$20,000 - 5% of Account Balance;</li> <li>◦ \$20,000 to \$50,000 - \$1000;</li> <li>◦ \$50,000 and above - additional 1% of balance over \$50,000</li> </ul> </li> <li>• Annual accounting fee of \$100</li> <li>• Can designate remainder beneficiary for up to 75% of balance</li> </ul> <p><b>Surplus Income Pooled Trust (Community Trust 3)</b></p> <ul style="list-style-type: none"> <li>• Excess Income Trust</li> <li>• Minimum deposit must be maintained in the account: \$300</li> <li>• One-time non-refundable enrollment fee of \$250</li> <li>• Double the monthly deposit is required before expenses can be paid, with one month remaining available for bill pay</li> <li>• Flat monthly fee ranging from \$30 - \$350 depending upon the monthly spend-down deposit amount. For deposits over \$4000 contact Life's WORC to determine the fee. (<a href="#">Surplus-Fee-Schedule.pdf</a>)</li> <li>• Annual accounting fee of \$50</li> </ul> <p><b>Individual SNT</b></p> <ul style="list-style-type: none"> <li>• \$500 non-refundable, one time enrollment fee</li> <li>• Minimum initial deposit \$50,000</li> <li>• Annual Fees: Balances up to \$300K; \$1,250 plus 1% of balance over \$50K</li> </ul>	
<p><b>LIFE, Inc. Pooled Trust</b>  (Labor &amp; Industry For Education, Inc.)  112 Spruce St  Cedarhurst, NY 11516  Telephone: (516) 374-4564 ext. 3  <a href="http://www.lifetrusts.org">www.lifetrusts.org</a></p>	<p>LIFE offers:</p> <p>(i) a self-settled (i.e. established by the beneficiary) monthly spend-down trust</p> <p>(ii) a self-settled asset trust and</p> <p>(iii) third-party asset trusts</p> <ul style="list-style-type: none"> <li>• \$300 one time sign-up fee</li> <li>• \$200 annual fee from the second year on</li> <li>• Monthly fee depends on amount of the spend-down (set fee, not percentage)</li> <li>• No minimum deposit</li> <li>• Automated Monthly bill pay.</li> <li>• Trust established in 2 business days guaranteed</li> <li>• Process of bill requests in 3 business days guaranteed (no more late bills)</li> <li>• Dedicated trust counselor assigned to each trust client</li> <li>• <u>Filable Joinder Agreement</u></li> </ul>	<p>Yes (Trust I)</p>
<p><b>NYSARC, Inc. Trust Services</b>  29 British American Blvd  Latham, NY 12110  (Use this address for Fed Ex or UPS - otherwise use mailing address below)  Mailing address  NYSARC Inc. Trust Services  POB 1531  Latham, NY 12110  (But use regular address for UPS or Fed Ex)</p> <p>Telephone: (518) 439-8323  Toll Free: (800) 735-8924  Facsimile: (518) 439-2670  E-mail: <a href="mailto:Trustsdl@nysarc.org">Trustsdl@nysarc.org</a>  <a href="http://nysarctrustservices.org">http://nysarctrustservices.org</a></p>	<p><b>Community Trust I - Self-Settled trust for asset protection</b></p> <ul style="list-style-type: none"> <li>• Minimum deposit: \$300, including \$200 one-time enrollment fee - non-refundable</li> <li>• FEES: <ul style="list-style-type: none"> <li>◦ \$25 annual accounting fee charged every July</li> <li>◦ \$1/month Allocation Fee</li> <li>◦ Co-trustee fee of 0.75% annually charged at monthly rate of .0625% based upon balance at end of preceding month <ul style="list-style-type: none"> <li>▪ Plus, the greater of: <ul style="list-style-type: none"> <li>▪ 0.9% annual rate, charged monthly at .075% of average monthly assets OR</li> <li>▪ Flat fee of \$10/mo.</li> </ul> </li> </ul> </li> </ul> </li> <li>• Intended for lump-sums, not monthly spend-down</li> <li>• Remainder at beneficiary's death is retained by trustee</li> </ul> <p><b>Community Trust II - self-settled for Medicaid Spend Down</b></p>	<p>Yes (Community Trust II)</p>

	<p>(Surplus Income)</p> <ul style="list-style-type: none"> <li>• Minimum initial deposit – \$300, includes \$200 one-time enrollment fee - non-refundable</li> <li>• Minimum balance equal to the monthly spend-down is recommended for overdraft protection and emergency needs, but NYSARC will waive the minimum balance deposit for someone enrolled in their e-deposit program.</li> <li>• E-deposit Program - electronic deposits of surplus income (at no additional cost)</li> <li>• Automatic payments of rent and other regular bills</li> <li>• FEES: <ul style="list-style-type: none"> <li>◦ \$50 annual accounting fee (July)</li> <li>◦ \$1/month Allocation Fee</li> <li>◦ Pro rata share of annual audit, tax preparation costs for Trust</li> <li>◦ Co-trustee fee of 0.75% annually charged at monthly rate of .0625% based upon balance at end of preceding month</li> <li>◦ Plus, the greater of: <ul style="list-style-type: none"> <li>▪ 0.9% annual rate, charged monthly at 0.75% of average monthly assets OR</li> <li>▪ Flat fee ranging from \$30-\$240 depending upon amount of monthly contribution (if over \$4,000, contact NYSARC to determine fee)(Fee schedule posted online)</li> </ul> </li> </ul> </li> </ul> <p><u>Community Trust III - Self-settled for Assets of \$250K+</u></p> <ul style="list-style-type: none"> <li>• No enrollment fee</li> <li>• Minimum deposit: \$250,000</li> <li>• Intended for lump-sums, not monthly spend-down</li> <li>• Administration of Medicare Set-Aside accounts available</li> <li>• Monthly fee of 0.06% or 0.075% depending upon balance, plus trustee bank fee not to exceed 0.0625% (0.75% annually)</li> <li>• Potential for remainder beneficiary if there are funds left after any possible state(s) Medicaid payback is fulfilled</li> </ul> <p><b>GENERAL FEATURES OF NYSARC TRUSTS:</b></p> <ul style="list-style-type: none"> <li>• NO ANNUAL RENEWAL FEE (some other trusts charge up to \$200/year)</li> <li>• Unlimited disbursement requests (some others charge up to \$10 for each additional disbursement)</li> <li>• 24/7 access to account information via automated phone system</li> <li>• Fully-staffed beneficiary support team by phone</li> <li>• Phone line exclusively for professionals to reach NYSARC management quickly</li> <li>• 48-hour approval of new trusts (expedited approvals with prior notice)</li> <li>• Prompt processing of disbursement requests</li> </ul> <p><u>NYSARC Chart Comparing 3 Pooled Community Trusts</u></p> <p><u>Links to Documents for all 3 Pooled Community Trusts</u></p>	Yes
<p><b>Protect Your Family (PYF)</b> 303 Merrick Road, Suite 505 Lynbrook, NY 11563 Tel: 516-837-3737 Fax: 516-837-9430 Email: <a href="mailto:Info@pyftrust.org">Info@pyftrust.org</a> Website: <a href="http://pyftrust.org">pyftrust.org</a></p>	<p>Medicaid Pooled Income Trust</p> <ul style="list-style-type: none"> <li>• \$300 application fee</li> <li>• \$200 annual fee</li> <li>• Sliding scale monthly fee, based on surplus amount</li> <li>• Can pay the monthly fee on a monthly basis or pay for the full year in advance (10% off if paying for the year)</li> </ul> <p>Medicaid Asset Trust</p> <ul style="list-style-type: none"> <li>• \$300 application fee</li> <li>• 20% annual administrative fee</li> <li>• \$150 renewal fee</li> </ul>	Yes

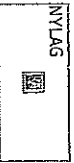
<p><b>SCS Pooled Trust</b> 1404 Coney Island Avenue Brooklyn, NY 11230 Telephone: 718-971-2509 Fax: 844-623-0481 Email: <a href="mailto:info@seniorcommservice.org">info@seniorcommservice.org</a> <a href="http://www.seniorcommservice.org">www.seniorcommservice.org</a></p>	<ul style="list-style-type: none"> <li>• \$250 Enrollment Fee</li> <li>• Monthly administrative fee of 10% of monthly required deposit (Min. \$25/Max \$200)</li> <li>• Unlimited disbursements</li> <li>• No Minimum balance requirement</li> <li>• No Minimum funding requirement</li> <li>• \$100 Renewal Fee</li> <li>• Monthly deposits can be made by ACH Direct Debit</li> </ul>	<p>Yes</p>
<p><b>The Rose and Maurice Halpern Lifetime Care Foundation at OHEL</b> 156 Beach 9th Street Far Rockaway, NY 11691 718 686 3170 <a href="http://www.ohelfamily.org/Zq=lifetime_care/pooled-trusts">http://www.ohelfamily.org/Zq=lifetime_care/pooled-trusts</a> Email: <a href="mailto:lfttrusts@ohelfamily.org">lfttrusts@ohelfamily.org</a></p>	<p><b>The Lifetime Care Foundation Community Pooled Trust I</b></p> <ul style="list-style-type: none"> <li>• Third-party trust</li> <li>• A portion of the funds can be invested</li> <li>• An initial deposit minimum of \$20,000 must be received in order for a client's funds to be invested. The first \$10,000 is kept in a liquid account, and the next \$10,000 is invested. At a point when the liquid \$10,000 reaches a balance of \$0, money will be divested from the investment account to the liquid account in increments of \$10,000</li> </ul> <p><b>The Lifetime Care Foundation Community Pooled Trust II</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• For those clients wishing to deposit liquid assets into a trust in order to preserve government entitlements, while having a portion of this money invested</li> <li>• An initial deposit minimum of \$20,000 must be received in order for a client's funds to be invested. The first \$10,000 is kept in a liquid account, and the next \$10,000 is invested. At a point when the liquid \$10,000 reaches a balance of \$0, money will be divested from the investment account to the liquid account in increments of \$10,000</li> </ul>	<p>Yes</p>
<p><b>The Theresa Foundation Pooled Trust of New York</b> 250 Lido Boulevard Lido Beach, NY 11561 (516) 432-0449 <a href="http://www.theresafoundation.org">http://www.theresafoundation.org</a></p>	<p><b>The Lifetime Care Foundation Community Pooled Trust III</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Can enable disabled individuals and seniors to use their excess income to pay for their own supplemental needs, such as rent, utilities, and medical services not covered by Medicaid and/or other entitlements programs</li> </ul> <p><b>Fees</b></p> <ul style="list-style-type: none"> <li>• \$900 annual fee (first year's fee due at initiation)</li> <li>• \$10 fee per check for any payments in excess of three per month</li> <li>• For Trusts I &amp; II only: <ul style="list-style-type: none"> <li>◦ Investment fees of approximately .75% from Bernstein Global Wealth Management</li> <li>◦ 1% investment fund management fee (if placed in investment account) <ul style="list-style-type: none"> <li>▪ Annual investment fees: <ul style="list-style-type: none"> <li>▪ 1.5% for \$25,000-\$250,000</li> <li>▪ 1% for the next \$250,000-1 Million</li> <li>▪ 0.5% for additional amounts over 1 Million</li> </ul> </li> </ul> </li> </ul> </li> </ul>	<p>Yes</p>
<p><b>The Theresa Foundation Pooled Trust</b></p>	<ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Annual fee of 2% of trust assets</li> <li>• One-time administrative fee of \$2,500</li> <li>• Designed for sheltering lump-sums</li> </ul>	<p>Yes</p>



<p>Administered by The Center for Special Needs Trust Administration, Inc. 4912 Creekside Drive Clearwater, FL 33760 (877) 766-5331 <a href="http://www.centersweb.com">http://www.centersweb.com</a> <a href="http://centersweb.com/SNT/types_pooled_state.html">http://centersweb.com/SNT/types_pooled_state.html</a></p>	<p>The Theresa Pooled Income Trust</p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• One-time opening fee of \$175</li> <li>• Monthly service fee of \$25 - \$200, depending upon amount of monthly contribution</li> <li>• Monthly maintenance fee of 0.875% of account balance</li> <li>• Designed for sheltering excess income</li> </ul> <p>The Theresa Foundation Community Trust</p> <ul style="list-style-type: none"> <li>• Third-party trust</li> </ul>	<p>No</p>
<p>UJA-Federation Community Trust Program Department of Planned Giving and Endowments 130 E. 59th Street, 10th Floor New York, NY 10022 <a href="https://ujafedny.giftplans.org/index.php?CID=238&amp;MLD=12">https://ujafedny.giftplans.org/index.php?CID=238&amp;MLD=12</a> Irina Tuchina (212) 836-1150 <a href="mailto:tuchina@ujafedny.org">tuchina@ujafedny.org</a> Advocacy Service for trust beneficiaries: The Jewish Board - SNT - Supplemental Needs Trust for individuals with disabilities 1358 56th Street Brooklyn, NY 11219 <a href="https://jewishboard.org/">https://jewishboard.org/</a> Phone 718.851.7100 Fax 718.871.5811</p>	<p>Community Trust for Disabled Adults</p> <ul style="list-style-type: none"> <li>• Third-party trust</li> <li>• Minimum deposit: \$100,000, with at least \$20,000 invested initially with remainder to be deposited within 4 years</li> <li>• Beneficiary is assigned an advocate from a UJA agency</li> <li>• Annual fees: UJA-Federation administrative \$1,500/yr and advocacy \$5,000/first yr. then \$3,000/yr.</li> <li>• Upon the death of the beneficiary, 100% of the remainder is designated as per the Sponsor</li> </ul> <p>Community Trust II</p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Minimum deposit: \$50,000, payable over 5 years if necessary</li> <li>• Beneficiary is assigned an advocate from a UJA agency if full advocacy services are selected</li> <li>• Annual fees: UJA-Federation administrative \$1,500/yr and financial only advocacy \$2,000/yr. or full advocacy \$5,000/first yr. then \$3,000/yr.</li> <li>• Upon the death of the beneficiary, 50% shall be maintained in the Trust and the other 50% is first subject to a Medicaid right of recovery. If Medicaid has no claim these funds can be designated by the Sponsor.</li> </ul>	<p>No</p>
<p>UCS Disability Pooled Trust 1575 50th Street 3rd Fl Brooklyn, NY 11219 Ph: (718) 854-9300 Fax: (718) 506-9314 Email: <a href="mailto:trustdept@ucsbp.org">trustdept@ucsbp.org</a> <a href="http://www.ucstrustservices.org/index.html">http://www.ucstrustservices.org/index.html</a></p>	<p>Trust A</p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Enrollment fee: \$250</li> <li>• Minimum deposit: \$1,000</li> <li>• Annual fee of 2.5% of principal for deposits of \$1,000 - \$30,000; no additional fee for amounts in excess of \$30,000</li> <li>• Annual renewal fee: \$200</li> </ul> <p>Trust B</p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Enrollment fee: \$250</li> <li>• Minimum deposit: \$100</li> <li>• Monthly fee of 10% of required monthly deposit (minimum \$30/mo., maximum of \$200/mo.)</li> <li>• Annual renewal fee: \$100</li> <li>• Monthly contributions can be made by ACH direct debit from bank account</li> </ul>	<p>Yes</p>
<p>Westchester ARC Foundation 121 Westmoreland Avenue White Plains, NY 10606 <a href="http://www.westchesterarc.org/">http://www.westchesterarc.org/</a> Anne Sweazey (914) 428-8330, ext. 3336 <a href="mailto:asweazey@westchesterarc.org">asweazey@westchesterarc.org</a></p>	<p>Community Trust I - third-party trust Community Trust II - self-settled trust</p>	<p>No</p>

<p><b>Western New York Coalition Pooled Trusts</b></p> <p>Go to <a href="http://www.wny.pooledtrusts.org">www.wny.pooledtrusts.org</a> for downloads, and more information</p> <p>Contact: Rachel Schepart (716) 853-3087 ext. 227</p> <p>Trustees: People Inc. &amp; Legal Services for the Elderly, Disabled or Disadvantaged of WNY, Key Bank (fiscal trustee) Only available to Erie, Niagara, Cattaraugus, Chautauqua and Allegany Counties</p>	<p><b>WNY Coalition Pooled Medicaid Payback Trust (Trust #1)</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Accepts income deposits</li> <li>• No minimum deposit</li> <li>• Initiation fee: \$100</li> <li>• Monthly fee sliding scale based on amount deposited</li> </ul> <p><b>WNY Coalition Over 65 Pooled Trust (Trust #2)</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Accepts income deposits</li> <li>• Only for individuals aged 65 or older</li> <li>• No minimum deposit</li> <li>• Initiation fee: \$100</li> <li>• Monthly fee sliding scale based on amount deposited</li> </ul> <p><b>WNY Coalition Under 65 Pooled Trust (Trust #1) and Over 65 Pooled Trust (Trust #2)</b></p> <ul style="list-style-type: none"> <li>• Self-settled trust</li> <li>• Accepts lump sums without a minimum deposit</li> <li>• Initiation fee: 10% of Deposit not to exceed \$1,000</li> <li>• Annual commission: <ul style="list-style-type: none"> <li>◦ \$10.50 per thousand on the first \$400,000</li> <li>◦ \$ 4.50 per thousand on the next \$600,000</li> <li>◦ \$ 3.50 on the balance in the pooled trust</li> </ul> </li> <li>• Plus additional annual commission by bank trustee</li> <li>• Semi-annual accounting fee: \$6</li> <li>• Termination fee: 1% of all amounts paid out</li> </ul> <p><b>WNY Coalition Friends and Family Trust</b></p> <ul style="list-style-type: none"> <li>• Third-party trust</li> <li>• Only 25% of balance remainder at the death of the beneficiary is retained by trustees. Remaining 75% can be directed to others.</li> <li>• Initiation fee: 10% of Deposit not to exceed \$1,000</li> <li>• Annual commission: <ul style="list-style-type: none"> <li>◦ \$10.50 per thousand on the first \$400,000</li> <li>◦ \$ 4.50 per thousand on the next \$600,000</li> <li>◦ \$ 3.50 on the balance in the pooled trust</li> </ul> </li> <li>• Plus additional annual commission by bank trustee</li> <li>• Semi-annual accounting fee: \$6</li> <li>• Termination fee: 1% of all amounts paid out</li> </ul>	<p>Yes - but only for Erie, Niagara, Cattaraugus, Chautauqua and Allegany Counties</p> <p>Fee Schedule Income Only</p>
<p><b>YAI / National Institute for People with Disabilities</b></p> <p>460 West 34th Street New York, NY 10001-2382 <a href="http://www.yai.org/">http://www.yai.org/</a> (212) 563-7474</p>	<ul style="list-style-type: none"> <li>• Serves DD/MR/MI/ Phys Disabled, TBI.</li> <li>• Minimum deposit \$25,000 with some flexibility.</li> </ul>	<p>No</p>

This article was authored by the Evelyn Frank Legal Resources Program of New York Legal Assistance Group.



**Attached files**

- 📎 NYLAG PooledTrust 2018 Spanish.pdf (247 kb) ①
- 📎 SNTShort (May 2019).pdf (694 kb) ①
- 📎 NYLAG SNT Outline 1-13-19 FINAL.pdf (1.47 mb) ②
- 📎 Cover Letter to Medicaid with SNT.docx (53 kb) ①
- 📎 Pooled Income Trust Contribution Worksheets (42 kb) ①
- 📎 Pooled Trust Readiness Checklist.pdf (158 kb) ②
- 📎 2016-6-7 Pooled Trust Unit Liaison and Contact Information.pdf (131 kb) ②

Also read

- [Overview - Supplemental Needs Trusts](#)
- [Step-by-step guide to enrolling in a pooled income trust for Medicaid spend-down](#)
- [Legal Authorities Relating to Supplemental Needs Trusts](#)
- [Medicaid Disability Determinations - NYS Forms & Procedures \(with updated forms July 2012\)](#)
- [Spousal Impoverishment Protections for Married Couples where One Spouse is in a Managed Long Term Care Plan - Pooled Trusts Allowed as an Option](#)

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[Advocates Outline on Supplemental Needs Trusts and Rules for...](#)

[Next](#)

[How to use a pooled SNT to eliminate the Medicaid spend-down.](#)

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