













Name of Pooled Trust Address and Phone Number of Beneficiaries / \$ Amount of Assets in millions Funds Held by:	Minimum Account Size	Intake Fee to enroll the applicant	Annual Fee	Are there any other Fees?
 <b>Berkshire County ARC Special Needs Pooled Trust (BCARC)</b> Berkshire County Arc PO Box 2, Pittsfield, MA 01202 (413) 499-4241 ext. 266 178 Beneficiaries \$9.7 million assets Berkshire Bank	\$7,500 negotiable	\$500 non-refundable \$600 if a POA or guardian involved	2.2% \$250 minimum.	Income Tax Prep \$200 / yr. \$100 when account is closed
 <b>Bristol County ARC Pooled Trust</b> 141 Park Street Attleboro, MA 02703 (508) 226-1445 168 Beneficiaries \$11.7 million assets Bristol County Savings Bank	\$5,000 Waived in hardship cases	\$475 \$575 if POA or Guardian	\$250 minimum or 2.5% of sub account value	\$150 Income Tax prep if applicable.
 <b>Commonwealth Community Trust (CCT)</b> P.O Box 29408 Richmond, VA 23242 (804) 740-6039 Over 1,700 Beneficiaries and \$70 million assets True Link Financial Inc.	\$5,000	\$1,550	.5% to CCT .34% to True Link	\$150/year Record keeping fee \$100/year Trustee Fee
 <b>Guardian Community Trust</b> One Elm Square, Suite 2D, Andover, MA 01810 (978) 775-3500 850 Beneficiaries \$60 million assets Wilmington Trust	No Minimum	No Intake or Application Fee	3% <\$80 K 2.5% <\$120 K 1.75% <\$200 K 1.25% >\$200 K	Closing fee \$1,000; Tax Prep: \$150/yr.
 <b>PLAN of CT Pooled Trust</b> Planned Lifetime Assistance Network of Connecticut, Inc., P.O. Box 290937 Wethersfield CT 06129 (860) 523-4951 793 Beneficiaries \$9 million assets Morgan Stanley-Bank of America	\$1,000 or \$75/month recurring funding	\$1,050 for 1 client/trust; \$1,350 for 2 clients/trusts	\$75 / quarter .25% (25 basis points) to broker, for securities transactions	Tax preparation and probate account fees; \$300 for closing
 <b>PLAN of Mass &amp; RI MARC Special Needs Trust</b> 50 Cabot Street - Suite 206, Needham MA 02494 (617) 244-5552 814 Beneficiaries \$56.2 million assets Webster Bank Private Bank	No Minimum	\$600 \$750 if enrollment involve POA or Guardian	3% \$500 minimum	Tax prep: \$204/year; \$500 closing costs fee

Click to download : [Compare Third Party Supplemental Needs Trust administrators, for disabled beneficiaries under age 65.](#)

Name of Pooled Trust	Are disbursement checks issued by Trust staff?	Turnaround time to pay invoices	Does the Trust provide Social Work Services?	Can the Trust be listed as a Contingent Beneficiary by an Estate or another Trust?	% of remainder funds kept by Trust before Medicaid Estate Recovery
 <b>Berkshire County ARC Special Needs Pooled Trust (BCARC)</b> <small>Berkshire County Arc</small>	Berkshire Bank pays the check as directed by ARC.	7-10 days. Shorter for emergency requests	Yes, Social Work services are available. Cost:	Yes, after review of Trust counsel.	<b>5%</b> if closed in years 1-2; <b>20%</b> after 2 years
 <b>Bristol County ARC Pooled Trust</b> <small>Bristol County</small>	Yes.	5 - 7 business days	No. \$600.00 admin fee if report to govt agencies needed.	Yes, if an account is already funded.	<b>5%</b> if closed in year 1 or year 2 <b>25%</b> year 3 and after
 <b>Commonwealth Community Trust (CCT)</b> <small>Commonwealth Community Trust</small>	No - issued by True Link Financial	10 days	No - we engage third party case management services	Yes.	0% if Medicaid Recovery does not exceed the remainder
 <b>Guardian Community Trust</b> <small>Guardian Community Trust</small>	Bank delivers disbursements to Trust, then mailed from Trust office	2 - 4 days; 24-hrs. in emergency	Social Work visits and phone calls provided at no extra charge	Yes.	<b>5%</b> Year 1 <b>10%</b> Yr. 2 <b>15%</b> after year 3.
 <b>PLAN of CT Pooled Trust</b> <small>PLAN of Connecticut</small>	Checks issued by PLAN of CT	1 - 3 days	Free initial outreach home visit. \$60/hour after account established.	No. Exceptions only if approved by legal counsel and trust committee	<b>None.</b>
 <b>PLAN of Mass &amp; RI MARC Special Needs Trust</b> <small>PLAN</small>	Checks issued by trust.	5 - 10 business days; 24 hours if emergency request	Yes.	Yes. Call for language to include in documents.	<b>10%</b> if closed during year 1 or year 2; <b>20%</b> after 2 years

Click to download : [Compare Third Party Supplemental Needs Trust administrators, for disabled beneficiaries under age 65.](#)