



PLAN Ahead

PLAN of Maryland-D.C.,
Inc.

Volume II, Issue I
April 2007

PLAN Special Needs Trust Set to Reopen

PLAN's special needs trust, known as the PLAN Life Trust, is preparing to re-open its doors to new members. The trust, which was established in 2000 has been serving the needs of a limited number of beneficiaries since that time, but has been closed to new beneficiaries for several years. During that time the Board of Directors, assisted by attorney Stephanie Grogan, has worked to ensure that the trust is financially viable and that it is consistent with current laws and regulations.

The trust provides families with the opportunity to set aside funds for the care of their loved one with a disability in a way which will have minimal impact on

their loved one's eligibility for public benefits.

The PLAN Life Trust is a third party trust, designed to administer assets donated by a third party (typically a parent or grandparent) for the benefit of an individual with a disability. The funds in the trust are managed by the trustees, in this case PLAN's Trust Committee. Since the beneficiary does not have the right to demand the funds or to direct their use, the funds held in trust are not considered an asset of the disabled individual, and so do not automatically preclude that individual from receiving means based public benefits. Trust benefits are distributed in a way which does not duplicate

existing services and which is in accordance with the rules of key eligibility programs.

Although the trustees will plan to spend all of the money in the trust for the benefit of the beneficiary, the donors setting up the trust can specify what should be done with any funds remaining after the death of the beneficiary.

Donors must be members of PLAN, and PLAN must complete a Personal Plan of Care for the beneficiary before the trust is finalized.

For further information about the trust contact PLAN's Executive Director, Bernie Raiche, at 301-587-7815 X 25.

PLAN's Spring Support Group Starts April 12th

PLAN's Family Support Group will have its first meeting for this Spring on Thursday, April 12th. The group will hold three additional meetings this spring: April 19th, May 3rd, and May 17th. The meetings will be held from 6:00 to 8:00 p.m. at the Chevy Chase Presbyterian Church, One Chevy

Chase Circle, Washington, D.C.

The PLAN Family Support offers family members an opportunity to talk with other similarly situated family members. It can be a source of support and of useful information, as well as an opportunity

to make new friends.

All members of PLAN are welcome to attend. There is no charge for participation. For more information or to register please call Bernie Raiche, PLAN's Executive Director at 301-587-7815 X 25.

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Take a look at our website www.planofmd-dc.org for lots of helpful information, including:

- Copies of this and past newsletters
- Notices of upcoming events
- Staff biographies and pictures
- PLAN's services and fees
- Helpful links to other useful websites.
- www.planofmd-dc.org



Field Trip - Special Activity Survey

PLAN staff are hoping to organize a number of incredible field trips and special activities during the spring and summer months. The trips, hosted by PLAN staff members, will be opportunities for clients to see new places and try new experiences.

We want to make sure that we plan trips and activities which will be interesting to you, so we are conducting an informal sur-

vey. If you have ideas for great events please be sure to share your ideas with your case manager. Ideas which have been suggested so far include:

- Movies
- Bowling
- Put-put golf
- Museum visits
- Brookside Gardens
- The Baltimore Aquarium
- Shopping at a mall

Ice skating

The National Zoo

Be sure to let us know what you would like to see and what you would like to do!!!!

Did you know that in the Washington Metropolitan area you can ice skate all year round!!!

Volunteers Play a critical role at PLAN. Without our volunteers PLAN could simply not complete our critical mission

Volunteers play a key role in making it possible for PLAN to provide vital services to families and clients. There is currently a need for volunteers to fill several key positions:

1. **Board of Directors**
The Board sets the direction for PLAN and decides key policy is-

sues. There is an opening for one additional member.

2. **Personal Plan Review Committee**
PLAN develops a Personal Plan of Care to guide us in providing services to each of our clients. The PPRC meets monthly to re-

view Plans of Care. The Committee's unique mission is to help insure that the Personal Plans are effective in addressing the needs of PLAN families.

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PLAN Fall Picnic—Great Food—Great Company!!

PLAN held its Fall Picnic on a beautiful day last October 14th at College Gardens Park in Rockville.

About 60 people attended including clients, family members, members of the Board of Directors and PLAN staff.

The picnic was a great opportunity to make connections with other families, and to meet members of the PLAN staff and board.

Many people contributed to the success of the picnic. Many of those who attended brought

special dishes to share. Especially notable were the contributions by Steve and Claire Wallace, Glenn and Evelyn Flittner, Jack Miller and Elynn Bunnag.



Jack Miller (Office Manager), Evelyn and Glenn Flittner (President of the PLAN Board) prepare for the fall picnic.



CREATIVE EXPRESSIONS GROUP

Elyne and Mario have started the CREATIVE EXPRESSIONS GROUP. The intent of this group is to use creative arts (art, music, poetry, etc.) to express ourselves in verbal and nonverbal ways, to increase socialization and interpersonal skills, encourage personal empowerment, and to simply make new connections with people. This group will help participants to liberate and nurture their creative selves in a non-judgmental social setting. This group is now accepting new members!! We meet every other Monday evening from 5:45-7pm at the PLAN office. Snacks and materials are provided. No artistic skills are required! Please contact your case manager if you are interested in joining.

**We are in need of more donations of supplies for our group. Our wish list includes: small canvases, fingerpaints, gel pens, acrylic paints, molding clay, colored markers, and drawing paper...but we will accept anything that you want to give! A big thanks to all who have already donated!

Volunteers continued

1. **Filing and helping with mailings** We are in the process of revising our client records filing system. We need volunteers who can each spend a few hours a week helping with this task, and then helping us to keep up with the filing.
2. **Computer Network** PLAN would love to set up a computer network to help us to share files and to more effectively backup our system.

If you can help call Bernie at 301-587-7815 X.25.

May Picnic Planned

PLAN staff is pulling together the details for another great PLAN picnic this May. One thing we already know is that there will be lots of good food and it will be an opportunity to meet some of the other members of the

PLAN family. We would like to hear your thoughts about what you would like to see at the picnic. Share your thoughts with your case manager or call Bernie at 301-587-7815 X 25.

You won't want to miss this event.

For more information keep your eyes on our website:

(www.planofmd-dc.org)

The Planned Lifetime Assistance Network (PLAN) of Maryland-D.C., Inc. was established in 1985. For twenty-one years, our families have been helping your families PLAN for the future

PLAN's Board of Directors

PLAN's Board of Directors are the people responsible for setting PLAN's goals, priorities and policies.

The current Board members are:

Glenn Flittner—
President
Carol Osborne—Vice
President
Priscilla Goodby—
Secretary
Ned Schaefer—
Treasurer

“Tad” Olson, Jr.

Ann Plunkett

Steve Wallace and

Ann Wexler

Board members can be contacted by calling the PLAN office.

Holiday Open House

Last December PLAN held its Holiday Open House at the PLAN office in Silver Spring. About 20 clients, family members, staff and Board members attended the event which featured holiday music, great food, and a chance to meet other members of the PLAN family.



**PLAN of Maryland-D.C.,
Inc.**

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PLAN for Today and Tomorrow



We're on the Web!!
www.planofmd-dc.org

Mark Your Calendar—Upcoming Events

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|---------|---|
| 4/12/07 | Family Support Group - 6:00 to 8:00 p.m. |
| 4/10/07 | Trust Committee Meeting—1:30 to 3:00 p.m. |
| 4/19/07 | Family Support Group— 6:00 to 8:00 p.m. |
| 4/26/07 | Board of Directors Meeting—6:00 to 8:00 p.m. |
| 5/3/07 | Family Support Group— 6:00 to 8:00 p.m. |
| 5/07 | Fall Picnic —To be announced |
| 5/17/07 | Family Support Group— 6:00 to 8:00 p.m. |
| 5/24/07 | Board of Directors Meeting— 6:00 to 8:00 p.m. |
| 6/21/07 | Board of Directors Meeting— 6:00 to 8:00 p.m. |
| 7/20/07 | Board of Directors Meeting— 6:00 to 8:00 p.m. |
| 8/23/07 | Board of Directors Meeting—6:00 to 8:00 p.m. |
| 9/27/07 | Board of Directors Meeting— 6:00 to 8:00 p.m. |

PLAN
is a
**not for
profit,
501(3)(c)
organization.**

**Donations
to PLAN
may be tax
deductible**