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Promoting Independence.
Providing Peace of Mind.*

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2016 End of Year Report

This has been an exciting and formative 12 months for the Jewish Los Angeles Special Needs Trust, the first pooled special needs trust in Los Angeles County. We have gone from conceptualizing, planning and building infrastructure to a fully operational, independent nonprofit, with 5 part-time paid staff and two graduate-level interns, along with an experienced and knowledgeable licensed fiduciary, expert consultants in legal matters, graphic design, social media/marketing and data collection and analysis. We receive inquiries on a daily basis from parents and other relatives who have a loved one with a disability about our services, and also answer questions about government benefits, long-term financial and legal planning, and provide referrals to other community resources and to legal and financial advisors.

Here's some of the highlights of our work together during 2016:

- Transitioned from using Bet Tzedek Legal Services as our Fiscal Sponsor to full independent nonprofit status
- Researched and created our 1st Party Master Trust with a comprehensive and consumer friendly Joinder Agreement and enrollment packet
- Formed partnerships with a growing number of organizations including True Link Financial who is providing our trust administration and Jewish Family Service of Los Angeles who will provide fee-for-service Care Coordination services for our beneficiaries
- Built the foundation of our donor base including donations from our first fundraiser, a salon wine and cheese event held in March at the home of Stanley and Charlotte Kandel, and other individual donors
- Received an additional \$100,000 grant over two years from the Ross Endowment, through the Jewish Community Foundation of Los Angeles
- Launched the 1st Party Pooled Trust in August including a press release to 900 local and national media outlets and journalists and my Opinion piece paper edition of The Los Angeles Jewish Journal, published in October 2016 that was seen by thousands of readers

- Staff participated in 13 major outreach activities, including the first LAJAC Knowledge is Power workshop sponsored the Jewish Federation's Caring for Jews in Need strategic initiative
- Began enrollments for the 1st Party Pooled Trust including 2 full enrollments, more than \$75,000 in assets and a dozen people at various stages in the enrollment process

From our research and community needs assessment, we know that there are potentially thousands of individuals with disabilities in LA County who could benefit from our community-based services -- which include professional trustee oversight and professional financial management. With a focus on outreach and education efforts in 2017, along with launching our new 3rd party pooled special needs trust, we can look forward to increased interest and growth in client enrollment numbers in the next 12 months.

Thanks to your continued help and support with JLA Trust.

Sincerely,

Michelle Wolf

Michelle K. Wolf
Executive Director

Sandy Samuels

Sandor Samuels, Esq.
Chair of the Board

*Your donation is tax deductible to the full extent of the law (federal tax ID # 81-0820016). We would also like to thank the **Jewish Community Foundation of Los Angeles** for their generous seed funding to launch the pooled trust.*