



STABLE Accounts and Special Needs Planning

Course Description:

Financial management is a core responsibility for guardians, and the stakes can be high when the person under your care receives means-tested government benefits. This 3-hour course will cover several primary methods for protecting the assets of disabled people, including Ohio STABLE accounts, special needs trusts (SNTs), and other planning strategies.

As a result of attending this course, guardians will be able to:

1. Discuss the benefits, limits, and requirements of STABLE accounts; and
2. Describe how SNTs preserve benefits while accomplishing other goals for the person and their family.

Online Course:

Guardians may take the online version of the course in Ohio Court EDU:

<https://sco.esod.com/client/sco/default.aspx>.

Important information about online courses:

- Instructions: <http://www.supremecourt.ohio.gov/Boards/judCollege/adultGuardianship/onlineInstructions.pdf>.
- Guardians must complete the mandatory course evaluation at the end of the online course to receive a certificate.
- Co-guardians must complete courses separately under their own accounts to receive certificates in their own names.
- Guardians must submit their certificate to the local probate court where their guardianship is filed. For instructions on filing certificate, they can contact their local probate court.

Questions? Contact Judicial College staff at AdultGuardianEdu@sc.ohio.gov.