

# The Peak of Planning: Special Needs Trusts

*How a Special Needs Trust Can Take Your Family's  
Future from Uncertainty to Security*



by Tresi Weeks



## FOREWORD: A MOUNTAIN YOU CAN CLIMB

As the parent of a child with special needs, there are moments when you feel as though you are standing at the precipice of a great mountain, overwhelmed by what lies before you. *There is so much that you simply cannot plan for.* You learn to take it one step at a time – one day at a time – celebrating the milestones as they come. You seek out the best doctors, you learn the best ways to care for your child, and you help them realize their potential. You are their champion, and in many ways, they are yours.

But not every challenge is best met with a “one day at a time” approach. There are some concerns that must be met with careful, expert planning. And when you have done the planning that you can do, you gain a peace of mind that grants you endurance for the road ahead. My hope is that in the pages to follow you will be empowered as a parent, and as your child’s best advocate: in one of the ways you can help secure their brightest future.

A handwritten signature in black ink, appearing to read "Jhesi". The signature is written in a cursive, flowing style with a large initial 'J'.

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## I. BASE CAMP: I'M NOT SURE ABOUT THIS...

Benjamin Franklin said, "If you fail to plan, you are planning to fail!" It may sting a bit, but he makes a solid point. Why is it that so many put off estate planning, including the formation of a Special Needs Trust? There are many reasons, but in my experience, these are the most common:

- Belief that the State's legal process will accomplish what is fair and right
- Thinking one doesn't have enough assets to warrant an Estate Plan
- Confidence that loved-ones will know the decedent's wishes
- A lack of awareness regarding (1) the risks of not planning, and (2) the rewards of a great plan
- A desire to avoid (1) thinking about dying or becoming incapacitated, and (2) the major decisions that come with the territory

Perhaps you could relate to one or more of these rationales – and that's okay. However, if you continue reading, you're going to recognize that those reasons are misguided. What's more, they are actually counterproductive to what you really want. You want to know that your assets are going to the persons *you* choose. You want to know that your assets will be protected for as long as possible for the benefit of *your* family-not lost through divorce, for example. As it specifically pertains to our primary subject matter: you want to know that your child with special needs is going to have all the resources needed for his or her lifetime.

However, good intentions without good counsel can lead to error. For example, sometimes parents with multiple children will make the serious blunder of simply bequeathing the whole of their estate to the sibling(s) of their child with special needs, believing that his or her sibling(s) will take good care of their disabled brother or sister. This is a mistake for many reasons, including: death, divorce, creditors, illness, and bad judgment. Such a decision also carries with it an undue and unnecessary burden for the sibling(s). I want to help you avoid such pitfalls, and I understand that you have many concerns and questions, such as:

- If public benefits won't be enough, how much money will my child need to ensure his or her best quality of life?
- How can we fairly distribute our estate for the benefit of our special needs child *and* his or her sibling(s)?
- How can we ensure our other children won't be over – burdened?
- How can we be confident that assets left for our child with special needs will be handled with integrity?

While such concerns can only be adequately addressed with knowledge of your family's unique needs and priorities, I want you to be encouraged; there *are* solid answers and solutions found in wise counsel and the correct legal tools.

One of the primary legal tools utilized in Estate planning for families with a special needs child is the Special Needs Trust. If it seems like a scary and intimidating concept now, it won't when you have finished reading. What you may have seen as a mountain too high...really isn't. So get ready to climb! Knowledge truly *is* power. And knowledge about Special Needs Trusts equates to power to care for your child even after you're gone. That's a good thing! So, if you are the parent, grandparent or legal guardian of a child (adult or minor) with special needs, you'll want to read on to learn more about your options.



## II. SELECTING THE RIGHT EQUIPMENT

Think of a trust as the necessary equipment in the climb toward financial security for your child with special needs.

### Financial Security = Better Quality of Life

There are three basic types of Special Needs Trusts, and one (*pending*) legislative alternative:

- Third-Party Special Needs Trust: For a parent, grandparent or legal guardian who wishes to designate property for the benefit of a special needs child.
- Self-Settled Special Needs Trust: For protecting property belonging to the special needs child.
- Pooled Trust: Established by non-profit organizations, this trust pools funds from individual subaccounts for investing and proper handling. An individual with disability, parent, grandparent, legal guardian, or court order can initiate an individual subaccount.
- ABLE Act: The Achieving a Better Life Experience Act, or ABLE Act, would amend the IRS code to allow individuals to create tax-exempt savings accounts to hold funds for “qualified disability expenses.”

Your child’s needs, source of government benefits, and source of any private monies will help determine which of these tools will be useful for your particular situation. While these options differ in some important ways, you’ll see they have a lot more in common; I’ll point out distinctions when relevant.

## Does My Child Really Need a Special Needs Trust?

Each of the Special Needs Trusts listed above share the same purpose: they are each a *means* to provide financial security for your child with special needs for the *end* of securing a better quality of life. The first thing you may wonder is: “That sounds well and good, but why it is necessary?”

To understand why, it helps to know about the various types of government benefit programs. We’ll go over those programs more in the next chapter; for now, just know that there is a low threshold (\$2,000) to the amount of assets one can hold before that individual is disqualified from receiving benefits, such as Medicaid and SSI. These assets could come from an inheritance, a gift, a legal settlement—even a bank account someone establishes on behalf of the disabled individual. In other words, you do not want to leave money outright to your child with special needs.

Leaving assets outright to a person with a disability may have drastic unintended consequences. Such a gift may disqualify him or her from vital benefits; without these benefits, your child’s care may rapidly drain all of the monies you intended as *additional* support. Instead of maximizing quality of life for your child, all that will be left are government benefits; and *government benefits alone are often not enough*. The end results may either: (1) leave your child in a situation completely unacceptable to you, or (2) leave another family member with a crushing financial burden.

**A Special Needs Trust helps avoid these disasters and provides financial security, because when funds are placed in the proper trust, they don’t count towards the beneficiary’s assets for the purpose of determining eligibility for certain government benefits.** So a person with a physical or mental disability can maintain vital government benefits AND have an unlimited amount of assets, as long as they are administered for his or her benefit. Bottom line: Special Needs Trusts are good – very, very good.

## **How is the Trust Created and Used?**

After gaining an understanding of the purpose of Special Needs Trusts, it's useful to learn the details regarding *who* can create one of these trusts, and *how* the trust funds may be applied for your child's welfare.

### ***Who Can Create a Special Needs Trust***

#### Third-Party Trust

- A parent, grandparent, or legal guardian
- Siblings and other relatives or friends

#### Self-Settled Special Needs Trusts

- A parent, grandparent, or legal guardian
- A judge can order a Self-Settled Special Needs Trust be created for an individual with disabilities

#### Pooled Trust

- The *Pooled Trust* is created and administered by a non-profit organization, which in the state of Texas is the ARC of Texas.
- The individual with disability, parent, grandparent, legal guardian, or court order initiates the creation of a separate account, or *subaccount*, for individual beneficiaries.
- The funds from each subaccount are pooled for the purpose of investment and management.



### ***How Trust Funds Can Be Used***

The money in each type of Special Needs Trust may be distributed for many different things your son or daughter wants or needs, including:

- Furniture, cars, clothes, and other personal needs
- Medical expenses including insurance premiums, alternative therapies and any special equipment
- Social and recreational expenses like TVs, computers, movies, sports, vacations and camps
- Intellectual and artistic activities like classes, books, games and crafts

Note: the Trustee cannot give the beneficiary or guardian cash or debit cards. Distributions for food and housing may be made under certain circumstances.

### ***Choosing a Trustee***

The Trustee is the person who will manage the Trust and make decisions about how to invest or spend funds, so it's important to choose someone of integrity. Either or both of the child's parents can be the trustee, or a professional corporate trustee may be designated. After the parents pass away, the trustee can be a relative, friend or professional trustee.



## Additional Considerations

### ***Medicaid Payback***

A provision to be keenly aware of in selecting a Special Needs Trust or alternative is whether Medicaid Payback is required. If the answer is yes, then when the disabled beneficiary dies, any funds remaining in that particular trust or alternative will first be used to pay the federal government back for all the Medicaid dollars expended on the decedent's behalf before going to the remainder beneficiaries you have designated.

- Third-Party Special Needs Trusts: Medicaid Payback is NOT required
- Self-Settled Special Needs Trusts: Medicaid Payback IS required.
- Pooled Trusts: Medicaid Payback will be determined by whether the individual subaccount is Self-Settled or Third-Party.
  - Self-Settled subaccounts: Medicaid Payback IS required; however, you may be able to name the Pooled Trust as beneficiary in place of Medicaid, foregoing Medicaid Payback.
  - Third-Party subaccounts: Medicaid Payback is NOT required.
- ABLE Accounts: Medicaid Payback IS required.

### ***Divorce***

In the event of a divorce, a parent should consider if a revision of his or her estate plan may be necessary. For example, beneficiary designations of insurance and retirement accounts that formerly went to a spouse will now need to name the Special Needs Trust – not the ex-spouse or the child directly. If there are multiple children, then the trust will only be named for the portion that goes to your son or daughter with special needs. Please note: It is very important to meet with your attorney to review your documents and your goals anytime you experience a major life event such as a divorce. There can be a multitude of estate planning issues that need revisiting and revising.

### ***Child Support***

Because the law views child support payments to an adult child with disabilities as belonging to the child, there is a danger that such payments could disqualify the child from government benefits. The divorce decree will need to clearly state that support payments to an adult child with disabilities go directly to the Third-Party Special Needs Trust; otherwise, a Self-Settled Trust (*requiring Medicaid Payback*) will have to be created.

In addition, in Texas, child support obligations do not end with the non-custodial parent's death. Future payments can be taken from the decedent's estate. Therefore, the non-custodial parent may want to consider a life insurance policy that designates the Special Needs Trust in order to fulfill such future support obligations.

### **ABLE Accounts**

Special Needs Trusts provide several good options for various estate planning concerns. However, new legislation offers an expedient alternative. Individuals with disabilities face a dilemma when they try to save money. As we've discussed, if a single individual has more than \$2,000, they could lose their valuable Supplemental Security Income (SSI) and Medicaid services; for some, this will even mean losing housing and medical care. New legislation, called the [Achieving a Better Life Experience Act](#), or ABLE Act, presents a solution with the following highlights:

- The bill amends the IRS code to allow individuals to create a tax – exempt savings account, so the individual can use the funds in the account to pay for “qualified disability expenses.”
- Allowable expenses include education, primary residence, transportation, employment support, health and wellness, legal fees, assistive technology and personal support, and other personal expenses.
- ABLE Accounts have the same tax-favored status as a 529 education account, and interest earned is not taxed.
- Family members can contribute up to \$14,000 per year to the account.

- Most importantly, the funds in the ABLE account and distributions from the account are disregarded in determining eligibility for Medicaid and other means-tested federal programs.
- If the individual is receiving SSI, only the first \$100,000 will be disregarded. An individual's SSI check will be suspended if the account exceeds \$100,000, though they will not lose Medicaid eligibility.

### ***Medicaid Payback***

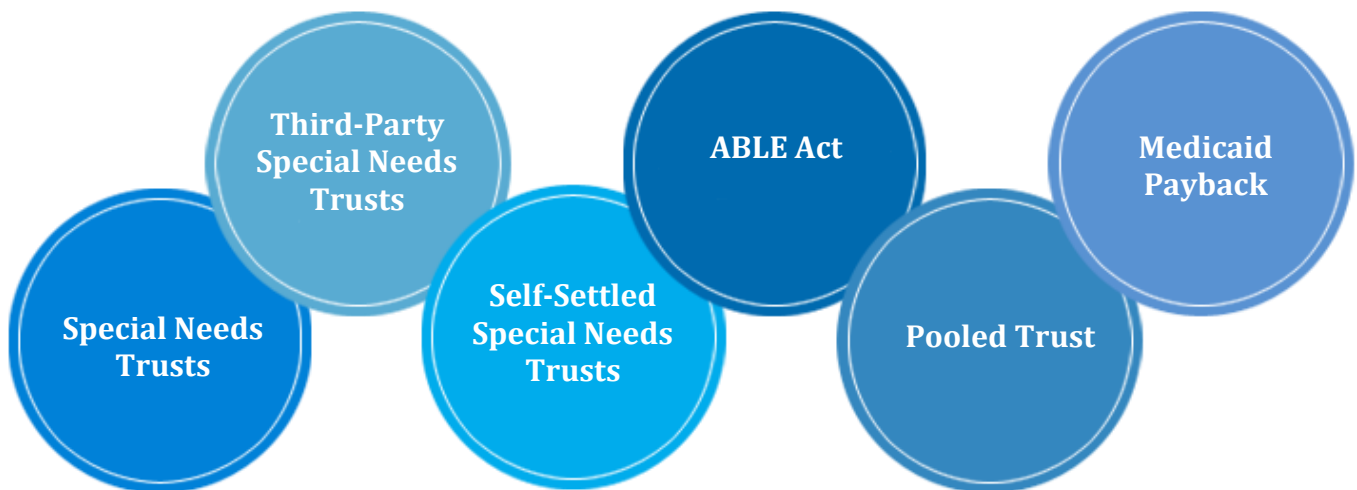
These accounts would be useful for individuals with disabilities who work and would like to save their own money. They would want to limit the account to \$100,000 in order to prevent suspension of their SSI benefits. The down side is that when the beneficiary dies, the funds remaining in the account must first be used to pay back Medicaid for amounts it expended on behalf of the individual. If any money is left, it will go to the individual's family or chosen charity.

### ***A Good Option?***

ABLE accounts may not be the best way for a parent or other relative to save for their loved one with special needs because of the Medicaid payback provision. With a Third – Party Special Needs Trust for the individual, the money is used for the individual's expenses but there is no Medicaid payback provision; when the beneficiary dies, the remaining funds go to the family or a designated charity, instead of to the federal government. So if the choice comes down to an ABLE account or a Third – Party Trust, the latter may be a better choice.

## Full Circle

We have come full circle. At the start of this chapter, the question of necessity was put on the table: *“That sounds well and good, but why is it necessary?”* Now having a basic understanding of each type of Special Needs Trust and the ABLÉ Act, you can appreciate the protection they provide and why they are so important. Depending on your family’s situation, you may already know if this is something to pursue. However, before I get ahead of myself, let’s forge on to learn about funding your child’s trust and the government benefits that will be the core of his or her care.



### III. KEEPING THE TENSION—FUNDING YOUR TRUST TO MAXIMIZE BENEFITS

We are going to build on our previous equation. Providing the financial support your disabled child will need for their lifetime is a 2-prong approach:

**Public Benefits + Private Funding = Financial Stability = Better Quality of Life**

In the previous chapter, I introduced the potential Catch-22 that can result without proper planning: funds meant to supplement actually *supplant*, and eligibility for vital government benefits is lost.

I want you to think of those government benefits as the core of your child's care – the bread and butter. Instead of an outright gift, you will fund your child's Third-Party Special Needs Trust to maintain those benefits. If your child receives a legal settlement, he or she will fund a Self-Settled Special Needs Trust to maintain those benefits. If Uncle Joe wants to give your special needs child a large monetary gift, he will gift it to your child's Special Needs Trust. *These are the strategic choices that will protect your child's core benefits.* Let's take a look at what those core benefits consist of.

#### **The Core**

##### ***Social Security Administration***

For individuals over age 18 who meet their definition of “disabled”, the Social Security Administration (SSA) offers two types of benefits:

Supplemental Security Income (SSI): This benefit is available to a disabled adult (as defined by the SSA) who does not have more than \$2000 worth of assets. Further, any monthly income the individual may receive must be limited. When considering the individual's assets, the resources of family members the disabled individual may reside with will not be considered if the child is 18 or older. Eligibility will not be presumed even if the family was receiving SSI for the child while he or she was under the age of

18. Eligibility will also not be presumed simply because the child received special education services.

Social Security Disabled Adult Child Benefits (SS DAC): For an individual who (1) became disabled prior to the age of 22, AND (2) whose parent or guardian is either deceased or drawing Social Security retirement or disability benefits, he or she may qualify to receive Disabled Adult Child Benefits (SS DAC). Unlike SSI, SS DAC qualification is not based on the individual's assets or income.

### ***Medicaid***

In Texas, if an individual qualifies for SSI, they are automatically eligible for Medicaid; other states may have different guidelines. Medicaid provides government-funded health insurance for disabled children and adults with limited financial means. Medicaid also provides services specific to disabled persons, as well as long-term care. Eligibility requires that the individual is (1) age 65 and older OR blind OR disabled, AND (2) does not have assets exceeding the legal threshold.

Together, these benefits provide a core of care that your child with special needs may need throughout their lifetime. Insurance, healthcare and steady income are indeed fundamental to any good financial plan. However, they shouldn't stand alone. Let's talk about how you, and others, can fund your child's Special Needs Trust.

## The Reinforcements-Funding the Trust

I can share with you *how* to fund your trust, but I cannot tell you *how much* to fund. That “how much” will take time and collaboration to determine. But once that number is determined, I can help you decide where the funds are going to come from. Sources include:

- Inheritance
- Retirement Account Beneficiary
- Life Insurance Beneficiary
- Gift
- Legal Settlement (usually to fund the Self-Settled Trust)



Knowing the facts and figures takes a lot of the unknown and fear out of the equation, and creates room for strategic decision-making. Perhaps you need to adjust your life insurance policy or annual retirement contributions. Certainly you’ll need to discuss potential gifts or inheritances from other relatives to ensure they do not make a direct bequest to your child with special needs; any such gift must be directed to the Special Needs Trust. Regardless of the source, when financial questions arise, having a plan will give you some much-appreciated clarity.



## Bringing It All Together: Families Like Yours

### ***Brothers Forever***

Paul and Bonnie have two sons; Sam is 25 and Jake is 15. Though Jake has Down's Syndrome, he does not have any of the serious heart problems that sometimes accompany the genetic condition. Jake's brother, Sam, is married to Jill and they just had their first baby.

Paul and Bonnie recently learned about Special Needs Trusts and want to understand if this might be something they should be pursuing. Up until now, their plans have been to entrust their entire estate – and all of Jake's financial welfare – to Sam. The parents know the deep love their sons have for each other and have great confidence in Sam. Sam has always looked out for Jake, and Jake has always been a bright spot in his big brother's life. Sam knows that Paul and Bonnie have counted on him in this regard; at times, it weighs heavily on him – and not because he doesn't love his brother, but because there have not been any discussions about specific goals and expectations for Jake's care.

Paul and Bonnie have recently begun to realize that they aren't being fair to Sam *or* Jake. What if something happened to Sam? Could Jill be counted on in the same way? What if Sam lost his job and fell into hard times – could creditors put Jake's financial security at risk? What *are* their goals and expectations for Jake long-term? These kinds of questions keep nagging at Paul and Bonnie, so they make an appointment with a financial planner and an attorney specializing in Special Needs Trusts.

Paul and Bonnie want to develop an estate plan that assumes the most costly possibilities for Jake's needs. The two meet with a financial planner so that the specifics can be sorted out. Next Paul and Bonnie meet with their attorney to discuss options. Based on the information their attorney gathers from them, she presents the following:

- Because Paul and Bonnie do not want to burden their son, Sam, with handling all of Jake's financial needs, nor unwittingly put Jake's welfare at risk, they will establish a

Third-Party Special Needs Trust for Jake so that any assets they leave him will not disrupt his eligibility for benefits.

- After the age of 18, Jake may rely on SSI and Medicaid for his core financial maintenance.
- The funds from his Special Needs Trust will be disbursed for any other supplemental needs Jake has. He'll be able to take more of his favorite art classes, go to the Joni & Friends Summer Camp each year, or even get some new boots and a cowboy hat for going with Sam and his family to the Rodeo.
- Based on the information provided by the financial planner, Paul and Bonnie will each obtain an additional life insurance policy. These policies will ensure that Jake's trust is well funded, and that they are able to leave Sam a fair share of their estate.
- Paul and Bonnie will reach out to family members to discuss their plans and make sure that everyone understands that any substantial financial gifts to Jake should be made to his Special Needs Trust under the guidance of Paul and Bonnie's attorney.

Having a plan in place has given Paul and Bonnie, and their two sons, reassurance about the future. Sam will still be the one looking out for Jake, but now that he knows the financial heavy lifting is done, he can just focus on enjoying his kid brother.

## ***A Mother's Love***

Kara's son Aidan was diagnosed with autism when he was 3 years old. As a single mother, Kara's greatest concern is Aidan's welfare if something were to happen to her. Kara has done a great job of building a strong support network – starting with extended family and including several teachers and health care professionals that have taken a special interest in Aidan.

Kara wishes to have an estate plan in place that will ensure Aidan's financial security. She makes an appointment with an attorney who specializes in Special Needs Trusts because she wants to know her plan will be effective and thorough. After her attorney has gathered all of the necessary background and financial information, several options are discussed. In the end, her attorney recommends the following:

- Kara will create a Special Needs Trust for Aidan's benefit; all of her assets will be bequeathed to this trust.
- Kara will select a professional corporate trustee for Aidan's Special Needs Trust.
- Kara will select a guardian, and two alternates, who will become Aidan's legal guardian if Kara dies or becomes incapacitated.
- In Aidan's trust, we will create a "Safety Net Team," or trust advisory committee, made up of a friend a family member, a financial advisor and a care manager. These individuals will make sure Aidan is taken care of after Kara passes away—for the rest of his life.
- Kara will change her life insurance and retirement account beneficiaries to name the Special Needs Trust rather than Aidan directly. This will avoid disqualifying Aidan from SSI and Medicaid.
- Kara leaves with plans to have a family meeting with relatives to discuss her estate plan. She will make sure that everyone understands that any gifts – in life or death – that a family member wishes to make to Aidan, *must* be gifted to the Special Needs Trust under the supervision of her attorney.

Both Kara and her family appreciate the care and thoughtfulness that went into her estate planning process. They are comforted to know that no matter what the future holds for Kara; Aidan will be taken care of financially.



## IV. THE PEAK: YOUR VIEW FROM THE TOP

I hope what we've discussed throughout these pages has answered many of your questions – namely, if a Special Needs Trust (or alternative), is something that could benefit your family. It's understandable that you may still have some trepidation about moving forward. For many, taking the first step is sometimes the hardest - often because they simply don't know what to expect. But someone who has completed the climb would likely tell you: "It wasn't as scary as I thought, and it was worth every step!" So what can you expect from me in the ascent toward a great plan? Here's a sneak "peak":



### Information Gathering

- When you call our office, we will provide you with a questionnaire that will give us an idea of your personal and financial situation, including details about your child with special needs.
- When your questionnaire is complete, we will schedule your first appointment.
- At this appointment, you will educate me about you, your family, your financial affairs, and your goals and desires for your child with special needs. I will then present different options based on your family's unique situation.
- Based on our discussion of the various options, I will recommend a plan and quote a flat fee for executing that plan from start to finish.

### Plan Creation

- If you are ready to proceed, I will begin drafting your customized plan.
- Your documents will be ready within about 3 weeks, at which time we will call you to schedule a 2<sup>nd</sup> appointment.
- At this 2<sup>nd</sup> appointment, we will review and sign the documents.

### Implementation

- In order to fully implement your plan, I will guide you in how to change your beneficiary designations.
- We will also coordinate with other family members' estate plans, to ensure that any bequests made to your child with special needs are handled properly.

I hope that this preview of our process will help you feel more at ease as you move forward with the information I've shared. As you can see, we will work together in a very collaborative and non-intimidating manner to come up with a plan that will leave you with a grounded confidence about your child's future.

### ***Final Thoughts***

As an attorney, I am committed to helping clients develop the best estate plan for their family. I understand how very important such a plan is for present and future security. As I close, I'd like to remind you that I am just one piece of a larger support network. You may want to begin working with a financial advisor to help you determine how to best use your assets to fund your son or daughter's Special Needs Trust. If you haven't already, now is a good time to start creating a network of people who know your child, who care about your child, and who are actively involved in your child's life. I encourage you to cultivate these valuable relationships, and to be in regular communication with these individuals about your child's well-being.

Finally, if at the outset of reading this eBook you were feeling overwhelmed or discouraged about these important matters, it is my sincere hope that the information I've provided has changed that, and left you empowered and filled with hope. This *is* a mountain you can climb, and I know you'll enjoy the view from the top. The "Peak of Planning" is really about peace – present and future. I look forward to meeting you soon!

## V. QUICK REFERENCE GUIDES

### Special Needs Trust/Alternative Quick – Reference

Type of Trust/Alt.	Created By	Funded By	Protects Eligibility?	Medicaid Payback?
<b>Third Party</b>	Parent, Grandparent, Legal Guardian	Assets of someone other than the beneficiary	Yes	No
<b>Self-Settled</b>	Parent, Grandparent, Legal Guardian, Disabled Adult, Court	Assets belonging to the special needs beneficiary, such as outright inheritance or lawsuit settlement	Yes	Yes
<b>ABLE Account</b>	Adult with disabilities, Family member	All of the above	Yes	Yes

### Core Benefits Quick – Reference

Type of Benefit	\$2,000 Asset Threshold?	Must be Disabled?	Benefit Received?
<b>SSI</b>	Yes	Yes	Monthly payment for food and housing
<b>SS DAC</b>	No	Yes <i>and</i> disability must have occurred before age 22	Monthly payment
<b>Medicaid</b>	Yes	Yes <i>or</i> be 65 and older <i>or</i> blind	Health care and long-term care

## VI. ABOUT THE AUTHOR

Tresi Moore Weeks is an attorney and founder of [The Weeks Law Firm, PLLC](#) in Plano, Texas, where she assists clients with estate planning, special needs planning, special needs trusts, probate and guardianship. After 11 years as a trial attorney, she opened her own estate planning law firm 17 years ago. As an advocate for her own child's special needs, she is passionate about helping families with loved ones with special needs.



Tresi serves as President of the Estate Planning and Probate Section of the Collin County Bar Association. She serves on the Board of Directors of Disability Rights Texas, and as Chair of the Mental Illness Advisory Council for Disability Rights Texas. She also serves on the Board of Directors for the Association for Independent Living (“AFIL”) in Dallas, as well as the Dallas Society of Financial Service Professionals. She enjoys her volunteer legal work for the Dallas Volunteer Attorney Program and the Collin County office of Legal Aid of North West Texas.

Tresi is a lifelong learner through her memberships in the National Academy of Elder Law Attorneys, Probate Trust and Estates section of the Dallas Bar Association, the Dallas Estate Planning Council, Estate Planning Council of North Texas, Wealth Counsel, Elder Counsel, and the State Bar College.

Tresi is a frequent speaker on special needs trust for attorneys, advisors, educators and parents of children with special needs. She is also a frequent speaker for women's and church groups about basic estate planning and godly stewardship. She lives with her husband Kevin, and they are active members of Watermark Community Church in Dallas.

*For more information about Tres, her upcoming speaking engagements or to access helpful articles, click [here](#).*



## **EDUCATION**

Baylor University School of Law , J.D., 1987

Baylor University, B.A. in Foreign Service, 1984

## **LICENSES**

Ms. Weeks became licensed to practice law by the Supreme Court of Texas in 1987. She is also licensed in the U.S. District Court, Northern District of Texas, and the U.S. Court of Appeals, Fifth Circuit.

## **AWARDS, ACTIVITIES, MEMBERSHIPS**

- Collin County Bar Association: President of the Estate Planning and Probate Section
- Disability Rights Texas: Board Member, Chair of the PAIMI Advisory Council
- Association for Independent Living, Dallas: Board Member
- Dallas Society of Financial Service Professionals: Board of Directors
- National Academy of Elder Law Attorneys: member
- Dallas Bar Association: member of the Probate, Trusts and Estates Section
- Dallas Volunteer Attorney Program: volunteer attorney
- Legal Aid of North West Texas: volunteer attorney
- Dallas Estate Planning Council: member
- Estate Planning Council of North Texas: member
- Society of Financial Service Professionals: member
- Legal Services of North Texas: volunteer, Pro Bono Service Award 1989-91
- Dallas Women Lawyers Association: President 1993, Vice President 1992, Board of Directors 1989-94, member 1988-95
- State Bar of Texas: member of the Real Estate, Probate and Trust Section. Mentor Program for Lawyers Committee 1994-98, Local Bar Services Committee 1994-96

## **FOR QUESTIONS OR TO SCHEDULE AN APPOINTMENT**

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