



The Universal Guardian Trust™

Parents are essentially acting as guardians for their own dependent children and need to appoint future guardians to take their place if something should happen causing the replacement of the parent. Also, parents raising children with mental and/or physical challenges have additional considerations such as providing guardians with the finances needed to accommodate any special needs of their children. This is especially important for avoiding unnecessary court intervention if a guardian-appointee relative or friend lacks the utilities and/or sufficient resources to serve as a guardian meaningfully.

Peace of Mind for Parents

The Universal Guardian Trust (UGT) is specifically designed as a foundational vehicle by which guardians are to carry out the wishes of a deceased parent regarding their own children, including children with mild disabilities or even “special needs” children. The UGT format utilizes a "check the box" option for applying certain administration terms in order to qualify the UGT as a "[Special Needs Trust](#)" (SNT) which will prevent a SSI recipient from losing the governmental SSI benefits (currently being received) even though the SSI recipient is a beneficiary of the UGT (after the grantor's decease).

Recommended Uses

The UGT is recommended for any parents, or custodians alike, who have minors and/or others in their care with either permanent or able-to-be-outgrown challenges or disabilities regardless of severity. Our Universal Guardian Trust platform provides (but is not limited to):

- Protection from court-ordered guardianship by strangers;
- Assessment for sufficient financial resources for the future guardian through end-of-life funding tools;
- Offers an additional layer of protection creating delineation of the successor trustee and future guardian roles by allowing the trustee to exercise fiduciary responsibility over the use of resources to ensure that financial resources are used in accordance with Grantor directives for the care of the dependent(s);
- A bridged instrument by which specific parent-directed applications of the [Universal Guardian Guide](#) can be understood and followed; and,

- A road-map for applying parent-directed, child-centric activities concerning daily living, diet, special education, family adviser relations, and many other instructions.

Appointing a Guardian

Parents raising children, and including those with challenges, may be surprised to learn that the courts take special interest in whom they believe are fit to care for their children. Parents who qualify for Waivered Services, for example, are even subject to monthly home visits and reporting.

Courts and state agencies may elect to scrutinize and exercise an opinion about who might be best to care for dependent children regardless of whether parents' wishes were stated in a Will. The best defense against this unwanted intrusion is to designate a guardian of your choice. Your appointed guardian can provide oversight and care working with a trustee of the UGT – whom you also appoint – that provides a holding vehicle for additional resources helping to ensure the successful custodianship of your future guardian appointee.

The Universal Guardian Guide

Our proprietary Universal Guardian Guide (the “Guide”) is a revolutionary, online guardian-reference system that works in conjunction with the Universal Guardian Trust. It is recommended for anyone caring for any minor children and/or other dependent children with disabilities, including SSI recipients. The Guide provides a comprehensive road map for your family’s guardian appointee, covering allergies, food sensitivities, physical care, special education, family advisers, challenges, disabilities, special needs, comforting routines, preferences, instructions, customized messages, and other additional resources. The Guide can be updated via a secure, online login portal and is made available to your appointed guardian when the time becomes necessary for the guardian’s access to the Guide.

