



PLANINJ

Planned Lifetime Assistance Network of New Jersey

35 Years of Stewardship and Advocacy

ANNUAL REPORT 2023

Notes from Leadership

Exciting Times at PLAN|NJ: A Message from the Board President



Thrilled to be leading PLAN|NJ in this momentous year, I see an organization reaching new heights after 35 years of growth. Witnessing its impact firsthand as a nurse caring for those with special needs, I joined the board only to be struck by the remarkable people I found.

Over half our board, like me, understand disability through personal experience – parents, family members, or, in my case, having an adored cousin with Down syndrome and a daughter who faced learning and medical challenges. While my aunt and uncle heroically secured support for my cousin, their worries about his future echoed my own concerns for my daughter. Thankfully, times have changed. My daughter now thrives, with a part-time job, vibrant social life, and strong community ties. Yet, the future still holds questions, and knowing PLAN|NJ will be there to help her live her best life brings enormous comfort.

Our board's personal connection is complemented by unparalleled professional expertise in law, finance, insurance, medicine, disability rights, education, and corporate administration. But that's not all – they're caring, creative, and dedicated to sharing their talents with integrity.

For 19 years, our exceptional Executive Director, Ellen Nalven, has steered our agency to national leadership. Supported by a team of passionate advocates who go above and beyond, she ensures top- notch service and fierce representation for our clients. Our priorities: expanding housing and health advocacy, strengthening Special Needs Trust administration, and championing the rights of those we serve.

In 2023, we impacted 4,653 individuals and families across all backgrounds, and we're committed to a 10% increase in 2024. This report details our impact, services, milestones, partners, and supporters. Remember, families: PLAN|NJ is here for you. Please consider a donation to help others. Thank you for your support!

Warm regards,

A handwritten signature in black ink, appearing to read 'Elizabeth G. Farishian'.

Elizabeth G. Farishian, RN, MA

COVER: Frankie and his service coordinator, Nicola, love outings involving ice cream cones with sprinkles.



35 Years of Stewardship and Advocacy: A Message from the Executive Director

Dear friends,

I am pleased to present this Annual Report to talk about the accomplishments we have achieved in 2023. Planned Lifetime Assistance Network of New Jersey's services are unique in the realm of offerings for people with disabilities. We are honored to have the trust of well over two thousand families who have requested our services, either now or in the future, to provide care and oversight when they are not able to do so and we take this responsibility extremely seriously. We are committed to operate at the highest level possible in everything we do, to provide peace of mind to the individual and to their family members. We strive to serve people in all communities, at all socioeconomic levels and with any type of disability they may experience.

Our exceptionally skilled and caring staff are there for families when needed. Future life planning is the core of what we do to assist people with disabilities and their families to secure a good life. This enables individualized, person-centered planning, whether a person needs a Trustee for a Special Needs Trust to protect essential public benefits and services, or an advocate, guardian or supported decision maker. We are here to assist in the way each person and family requests.

A LifePLAN prioritizes an individual's strengths, abilities and aspirations over their challenges. This approach is key to communicating to future caregivers what is important to the person, as well as what is important for him or her. Diane*, for example, is an artist who does beautiful work in pen, ink and watercolor. She lives in her own apartment and loves her job working as a cashier at a grocery store. Diane happens to have Autism and requires a Guardian for support making certain decisions. Diane's LifePLAN helps ensure that Diane will have access to all the things that she loves to do even if circumstances in her life change at any point.

This work, and the tremendous growth we have experienced since our inception 35 years ago, could not be accomplished without the involvement of our many stakeholders: people with disabilities and their families, professionals including attorneys, financial advisors and human service providers among many others. We are grateful for the collaboration from all the people who have helped us accomplish a strong, stable organization that strives to assist everyone we can to enjoy a good life.

Warm regards,

Ellen B. Nalven, M.Ed., *Executive Director*

*name changed for privacy

Mission

The mission of **Planned Lifetime Assistance Network of New Jersey (PLAN|NJ)**, a nonprofit organization, is to help families of people with disabilities answer the question: **"Who will care for my loved one when I'm gone?"** A person experiencing significant disabilities needs a foundation of support, one that is tailored to their individual needs and preferences.



Janeen enjoys visiting family in her wheelchair accessible van.

We offer exemplary care coordination, guided oversight of financial affairs, and compassionate actions to enhance quality of life. We partner with families to provide their loved ones with a lifetime of assistance. Whether services are needed now or in the future, we initiate assistance whenever a family is ready and help to maintain continuity and peace of mind for all concerned. We understand that each family and individual is unique, and we take a personalized approach to planning. We work with families to understand their goals and dreams for the future, and we develop a plan that will help them achieve those goals.

Vision

PLAN|NJ envisions a world where all individuals with disabilities can live full and independent lives. This means having a safe and appropriate place to call home, financial stability and security, suitable and appropriate education, a challenging and rewarding place of employment, a fulfilling network of support, participation as a contributing member of the community, the ability to have choices and personal control, and advocacy to protect human rights and to access benefits and services.

Values

We believe that everyone deserves to have the opportunity to reach their full potential, regardless of their disability. We are committed to working towards a more inclusive and accessible world, where all people live with dignity and respect. We believe that all people with disabilities have the right to live their best lives. We provide a lifetime of services that are tailored to each individual's needs and preferences. We work with the person, their family and friends, social service providers, attorneys, financial advisors, and trust administrators to create a circle of support that ensures that the person receives the support and opportunity for self-determination they need to thrive. We believe in a strength-based, person-centered philosophy. This means that we focus on the person's abilities and preferences while providing continuous supports as needed. We provide compassionate and comprehensive care coordination, and we are committed to transparency, accountability, state-of-the-art systems, and continuous improvement.

Together We Plan



Daniel and his mother Carmelita enjoy traveling, recently visiting the Mona Lisa in Paris, France.

Thirty-five years ago, a group of parents came together with a shared concern: what would happen to their children with disabilities if they were no longer able to care for them? They founded PLAN|NJ, a nonprofit organization, dedicated to providing lifetime support for individuals with disabilities and their families.

Today, PLAN|NJ still understands the complexities of providing person-centered support, and we work with each family to develop a customized solution that meets their individual needs.

Whether your loved one has an intellectual, developmental, physical, or mental health challenge, or a combination of several, we can help you navigate the legal, financial, and healthcare systems. Our service coordinators will coordinate and advocate for the services and supports your loved one needs. We serve people with significant support needs, as well as others who are highly independent and benefit from occasional assistance as needed. We can also help you learn more about the best ways to plan for your loved one's future, so they can thrive. Our top priority is to ensure that your loved one has a safe, happy, and fulfilling life. We are here to help you every step of the way.

PLAN|NJ: A Trusted Friend and Expert

We are more than just a service provider. We are a trusted friend and expert who can help you through the most difficult times. We understand the challenges you face, and we are here to offer support and guidance. We coordinate a wide range of services, including:

- Special needs trust administration and management of public benefits
- Guardianship, advocacy, and case management support
- Home visit monitoring in group homes and nursing homes with personal care coordination
- Educational seminars and materials
- Access to housing and community living resources
- Health and wellness advocacy

We are committed to providing our services in a compassionate and respectful manner. We believe that everyone deserves to live a full and independent life, and we are here to help make that happen.

If you are looking for ways to secure the future for your loved one with a disability, please contact us today. We are here to help. Learn more at www.plannj.org



Dennis, recipient of a 2022 PLAN|NJ Life Planning Partner award, likes to grab coffee when out in the community with friends from his group home.

Essential Services to Enhance a Thriving Life



We know that families of people with disabilities have a lot on their plates. That's why we offer these essential services to help families take care of loved ones and improve their own peace of mind.

Special Needs Trust Administration We help set up and manage a special needs trust, which can enable an individual to maintain their eligibility for government benefits while also providing them with additional financial security. We work to create a budget that meets an individual's and family's specific needs and goals. Our mission to support people with disabilities prioritizes compassionate distribution decisions.

Life Planning PLAN|NJ guides families through the design of a comprehensive future plan - a LifePLAN - for a relative with mental health challenges or with intellectual, developmental or physical disabilities. This plan encompasses the legal, financial, home, and community supports that are required to help their loved one thrive. It tells a holistic story of the individual, their support needs and preferences, housing and employment recommendations, interests, activities, hopes and wishes for the future, and the goals and dreams their families have for them. The document is updated regularly as needs and circumstances change to give future caregivers a full and up-to-date understanding. We also consult with siblings and other caregivers to improve their capacity to advocate.

Guardianship If a loved one needs someone to support their decision-making, we can serve as their legal guardian. Monthly advocacy and home visits are a cornerstone of this service. We promote self-determination while also prioritizing safety and

Ruth celebrates her birthday with dinner and dessert.



well-being. We'll work with you to create a guardianship plan that ensures an individual's choices are being honored.

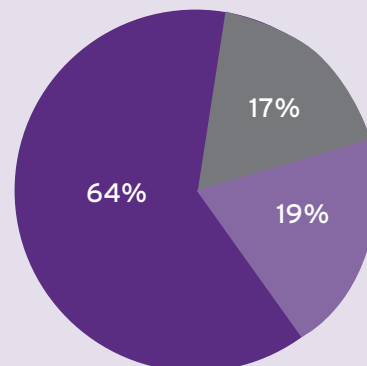
Advocacy, Home Visit Monitoring, and Care Coordination We can provide in-home care coordination and advocacy services to help a loved one live independently and safely. We'll visit them regularly to assess their needs and make sure they're getting the care they need. We'll also advocate on their behalf to ensure they have access to the services they deserve.

Representative Payee for Social Security Benefits If a family member is already receiving another PLAN|NJ service, you can also have us serve as their Representative Payee for Social Security benefits. When your loved one needs assistance with budgeting and bill paying, we can manage Social Security and other income to ensure financial solvency. As a representative payee, PLAN|NJ will monitor expenses, and assist with paying bills; ensure that basic requirements are met for food, clothing, and shelter; assist with budgeting; assist with eligibility and benefits issues, ensuring personal needs and financial obligations are met; and submit required reports to the Social Security Administration and other governmental agencies.

Pro Bono Family Support Services Program If an individual living with a disability doesn't have the means to pay for case management, advocacy, guardianship, Life Planning consultation or Representative Payee services, we may be able to help. Our Pro Bono Family Support Services Program provides advocacy and fiduciary assistance to people with disabilities who need it most at no cost to them.

We know that caring for a loved one with a disability can be challenging, and we're here to help. Our essential services can give families greater peace of mind by knowing their loved one is in good hands. We believe that everyone deserves to live a full and independent life, regardless of their disability. We are committed to helping our clients achieve their goals and live the lives they want.

**FUNDING
SOURCES**
FISCAL YEAR 2023:
\$2,309,752



We serve people who have a variety of levels of support needs – those with significant daily need for care and support, as well as people who are highly independent and have occasional needs for assistance and advocacy.

Active Trust Accounts:

2023: 600+

2005: 72

Hold LifePLANs
for **338** people
to secure their
future advocacy &
Guardianship
services

Managed
public benefits
for **45**
individuals and
guided **397**
families with
life planning
consultations

Currently, our
clients range
in age from
5-85 years old

Served as Guardian for
38 individuals
nearly twice as in 2005

This year
4,653 people
benefited from
all our services
and events

Visited 100+ people
each month in their homes
providing **person-**
centered services
and promoting **self-**
determination

Delivered **29**
educational webinars
for more than
3,000 families and
stakeholders

Delivered
1,655 hours
of service
at no cost
to the individual or family

Grew and
engaged our
LinkedIn social
media followers
to share information
and best practices
with constituents

Reached **2,000+**
people via the newsletter twice per year

Developed an **informational**
podcast series to engage those
who prefer an audio-only format

Leadership

- 2023 National PLAN Alliance Board of Directors and Conference Committee
- Co-chair, National Pooled Trust Standards Committee

Key Educational Collaborations

- The Arc-Planning for Adult Life
- Arc of Somerset
- Autism NJ Conference
- Begley Trustee School
- Bergen County Special Services
CAPE Resource Center
- Brain Injury Alliance of New Jersey
- Bright Harbor Health Care
- Calais School Transition Fair
- Community Supports Network
Transition Fair
- Cumberland County Guidance Center
- DAWN Center for Independent Living
- Eden Legacy Society
- The Family Institute
- Intensive Family Support Services of Somerset County
- JP Morgan Chase Autism parent organization
- Mental Health Association of Passaic County
- Moms Inc. Group of Gloucester
- Morris County Special Needs Group
- Morris Union Jointure Commission (MUJC) Transition Fair
- National Alliance for the Mentally Ill, (NAMI) Ocean County
Chapter and Intensive Family Support Services (IFFS) - Middlesex
- New Jersey Alliance for Family Support Organization
- The Opportunity Project
- Our Special Kids of NJ, Inc.
- Peapack Private Wealth Management
- Regional Family Planning Councils 2, 3, 7
- Rutgers Community Living Education Project (CLEP)
- Skylands Family Services
- St. John of God Community Services
- TiPS Transition Fair - Bridgewater-Raritan Regional School District



Bill is all smiles for the camera on a day out.

Uniting New Jersey's Disability Rights Community

Together We PLAN: Advocating for People with Disabilities and their Families is a PLAN|NJ Podcast Series currently in development that embodies the organization's unwavering commitment to championing the rights and dignity of individuals with disabilities.

Launching in 2024, the series brings together advocates, thought leaders, and families of people with disabilities to share experiences and strategies that will help others better envision the future – one in which their loved one can continue to thrive.

We intend for this series to serve as a beacon of hope for families navigating the complexities of lifetime assistance and future planning. Guests discuss legal guardianship, financial planning, Special Needs Trusts, how to be an effective advocate and the simple power of community. They generously share heartfelt stories, expert insights and collective wisdom so families feel less alone in their journey.

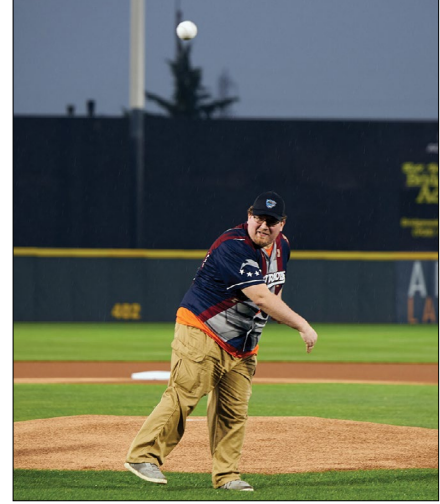
We are grateful to our co-sponsor the New Jersey State Bar Foundation for making this educational resource possible.



Podcast recording gets underway at the New Jersey Law Center with Nina Weiss Esq.; Elizabeth Farishian, President and Joseph Young, Esq, Vice President, PLAN|NJ Board of Directors; and Ellen Nalven, PLAN|NJ Executive Director.



Guests Crystal West Edwards, Esq. and Carla Ponn are interviewed by Ellen Nalven.



Supporters gathered on the field in 2023; Joey threw out the ceremonial first pitch.

Join Us in Support!

PLAN|NJ Family Night Out at the Somerset Patriots

We are pleased to enjoy a Family Night Out with over 500 families, staff, and supporters each year; it has become a true celebration of the disability rights community. The event benefits the people and families served by PLAN|NJ. 2023 event sponsors included: Merrill Lynch The Wiegner Group, Porzio, Bromberg & Newman, P.C., Timothy Rice Estate and Elder Law Firm, Peapack Private Wealth Management, True Link Financial, Somerville Elks Lodge 1068, Somerset Aerie #2137, NJM Insurance Group, PLAN|NJ Board of Directors, and IT Radix. Join us for our next night out on Thursday, September 12, 2024!

2024 Celebration of Abilities: 35 Years!

Members of the disability rights community will gather for PLAN|NJ's 2024 Celebration of Abilities at the Palace at Somerset Park on **Wednesday, May 22, 2024, 5:30 - 9 PM.** The biennial fundraising event honors people who are making major contributions to improving outcomes and enhancing quality of life for people living with disabilities in New Jersey. We will also celebrate the 35th Anniversary of the founding of PLAN|NJ. Proceeds from the evening will support PLAN|NJ's pro bono Family Support Services Program, which provides fiduciary and social services for individuals with disabilities who are in need. Honorees will include:



- Barbara Coppens: Outstanding Advocate Award
- Harold B. Garwin, Esq.: Legal Advocate Award; *President/Executive Director, Community Health Law Project (retired)*
- Bonnie Brien: Fred R. Patterson Parent Advocate Award; *Former Chair, Regional Family Support Planning Council*
- LeDerick Horne: Trailblazer Award; *Poet, Speaker, Advocate*
- Goldie Ellis: Public Sector Service Award; *Assistant Director, New Jersey Division of Developmental Disabilities (retired)*
- Life Planning Partner Awards

We hope to see you there!

You Are the Difference: DONATE TODAY!

One in five adults in our state has a disability. That is 20% of our population, which is millions of people!

Many of these people face complex decisions and may be vulnerable without support. They may need help with their healthcare, finances, or daily living.

We provide professional fiduciary and advocacy services and solutions to people with disabilities and their families. We also offer education and consultation.

Our services are essential to helping people with disabilities live full and independent lives, and we cannot provide them without your help. Your tax-deductible donation will help us:

- Provide advocacy and fiduciary services at no cost for those in need
- Offset costs to assist people with significant disabilities
- Promote independent living
- Expand services to meet ever increasing demand

Your generosity will help more families attain peace of mind, now and in the future.

Your donation can help a person with a disability live independently, receive the services they need to live a full and independent life, and remain safe and healthy in their own home. Your donation could also help the family of a person with a disability access legal and financial guidance to care for a loved one now and in the future.

No matter how much you donate, it will make a difference. YOU will make a difference! Please donate today and have a positive impact on the lives of people with disabilities. To donate, please visit our website at www.plannj.org. **Thank you for your support.**



Paige enjoys training in the martial arts.

PLAN|NJ Staff

Nancy Dilliplane, *Senior Director of Trust Services*
23 years of service

Jason Miller, *Senior Director of Social Services and National Certified Guardian*
17 years of service

Ryan Camales, *Accounting Manager*
6 years of service

Melanie Miquel, *Social Services Manager, and National Certified Guardian*
6 years of service

Kerry Lee, *Director of Operations*
5 years of service

Nicola Nero, *Senior Service Coordinator*
5 years of service

Roberta Lee, *Office Manager*
22 years of service

Ellen Ball Nalven, M.Ed., *Executive Director*
19 years of service

Total number of employees: **18 full time, 10 part time**

Employees with 5-10 years of service: **10**

Employees with 10+ years of service: **9**



PLAN|NJ Board of Directors

Executive Committee

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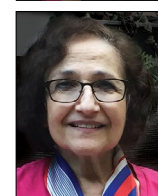
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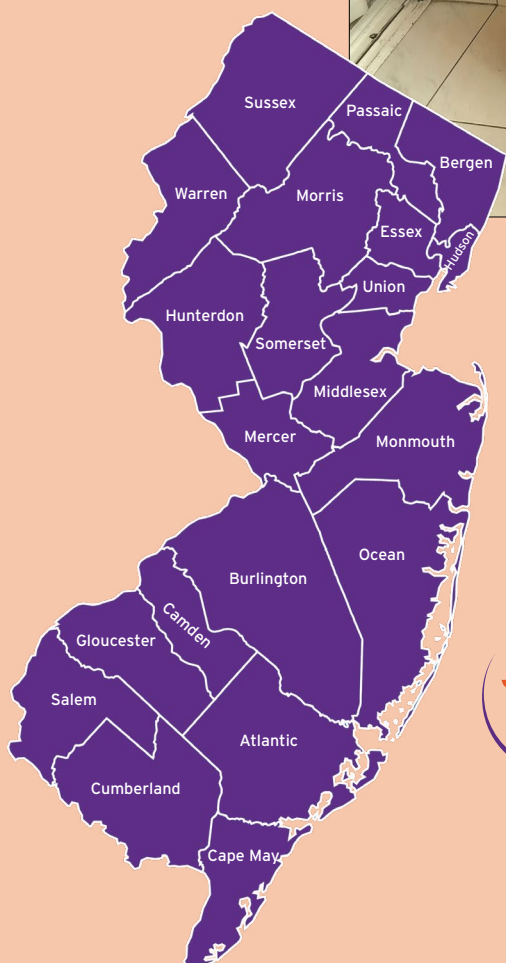
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Design: R studio T, New York, NY • **Printing:** Gregory Press, Kenilworth, NJ

Photos: Frank DiGiovanni (pages 12, 14); So Good Media, Lancaster, PA (page 11); Disability Images, a Division of Design Pics Inc., Edmonton, AB and iStock by Getty Images, Calgary, AB (page 7) • **Map:** Shutterstock, New York, NY



Tysai and his mother Jennifer head out for a family celebration.



We are a statewide organization that provides services to individuals with disabilities and their families. We offer fiduciary and social supports to help people with a range of physical, intellectual, developmental, and mental health challenges live full and independent lives. **No matter where you live in the state, we can help. Contact us today to learn more.**



PLAN|NJ

Planned Lifetime Assistance Network of New Jersey

P.O. Box 547 Somerville, NJ 08876-0547

(908) 575-8300 Fax: (908) 927-9010

info@plannj.org www.plannj.org