



KEEPING PROMISES: A Night to Remember

What a wonderful evening! On May 13th, 2026, disability rights leaders and friends gathered at the 2026 PLAN|NJ Celebration of Abilities to recognize the remarkable achievements of key community members, clients, and staff.

Co-hosts Liz Farishian, president of the board of directors and Jason Miller, executive director, led the proceedings as the following individuals were honored for their contributions to disability rights in New Jersey:

- **Legal Advocate** Shirley Whitenack
- **Roselyn & Fred R. Patterson Advocate** Tom Baffuto
- **Life Planning Partners** Joseph C. and Ronald G.
- **Outstanding Advocate** Michael Loberfeld
- **Employees of the Year** Dylan Motto, Nathalie Santiago
- **Trailblazers** Patrice Jetter, Garry Wickham, and Ted Passon



The Roselyn & Fred R. Patterson Advocate honoree Tom Baffuto, executive director of the ARC of New Jersey (now retired), upon receiving his award, as seen with (L to R): Ellen Nalven, senior advisor; Liz and Jason.

PHOTOS BY FRANK DIGIOVANNI

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Patrice Jetter

Keynote speaker Patrice Jetter spoke of the importance of being persistent in advocating for the self and others. Her life is beautifully documented in the Emmy-winning film "Patrice: The Movie."

Throughout the night, classical pianist Lorn Drumheller and Vincent Troyani and his jazz quartet infused the Palace at Somerset Park with musical joy. Visual artists Rachel Beth Horowitz and Tamara Kaplowitz shared original works for donation purchases. See more photos at <https://plannj.org/2026-celebration-of-abilities/>.



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Pictured along with Patrice and her partner Garry Wickham are Paul Aronsohn, disability rights advocate and Nicola Nero, assistant director, social services, PLAN|NJ.

Thank you to everyone who donated at the event to help PLAN|NJ keep its promises to families and who made the **2026 Celebration of Abilities** so unforgettable. Funds raised will support our pro bono Family Support Services program.

Our heartfelt thanks to the many sponsors of the 2026 PLAN|NJ Celebration of Abilities:

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SPECIAL NEEDS PLANNING: 10 Ways to Safeguard Your Loved One's Future

ASK AN
EXPERT

Financial planning for a loved one with disabilities is meant to protect their independence, quality of life, and eligibility for essential government benefits. Here are 10 important steps families can consider:

1 Create a Special Needs Trust (SNT)

A properly drafted Third-Party Supplemental Needs Trust allows family members to leave assets for a loved one without jeopardizing his/her eligibility for Medicaid or Supplemental Security Income (SSI). A self-settled, first-party Special Needs Trust is generally funded with the individual's own assets, while a third-party Supplemental Needs Trust is funded with assets from parents, grandparents, or other family members. Establishing the appropriate type of trust is important to preserve eligibility for Medicaid, SSI, and other government benefits.

2 Review Beneficiary Designations

Life insurance policies, retirement accounts, payable-on-death accounts, and annuities should avoid directly naming a person who is receiving means-tested benefits. Instead, coordinate beneficiary designations with your estate plan to designate a Supplemental Needs Trust as beneficiary so government benefits are not unintentionally compromised. Your Will should likewise direct any bequest for that beneficiary into a Supplemental Needs Trust rather than outright to the beneficiary, as an outright bequest could disqualify them from means-tested government benefits.

3 Consider establishing an ABLE Account

For eligible individuals, an ABLE account preserves their important public benefits while offering tax-advantaged savings that can be used for essential, qualified disability expenses to enhance their quality of life.

4 Choose the Right Trustee

Select a trustee who understands Special Needs Trust administration and the rules governing public benefits. In many cases, a professional or co-trustee arrangement is beneficial.

5 Plan for Your Own Incapacity

Individuals should ensure their own estate planning is in place, including a Power of Attorney, Will, and Health Care Proxy. The Power of Attorney should include express authority for the agent to establish and fund a Supplemental Needs Trust and engage in appropriate planning for a disabled beneficiary.

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6 Prepare a Letter of Intent

Share important information about your loved one's routines, medical history, preferences, caregivers, and future goals to guide those who will care for them.

7 Coordinate With Family Members

Encourage grandparents and other relatives to make gifts that support your loved one through the Special Needs Trust.

8 Think Beyond Financial Planning toward Life Planning

Consider guardianship or supported decision-making, housing, employment, education, and long-term care as part of a comprehensive plan.

9 Review Your Plan Regularly

Changes in the law, your family's circumstances, or your loved one's needs may require updates to your estate plan.

10 Work With an Experienced Special Needs Planning Attorney

Every family's situation is unique. A comprehensive plan should coordinate estate planning, government benefits, tax considerations, and long-term care strategies to protect your loved one's future.

Thoughtful planning today can provide lasting peace of mind tomorrow. Special Needs attorneys can help you develop a customized plan that protects your loved one while preserving the benefits and resources they depend on.

Richard I. Miller is Partner and Chair, Elder Law Department of Mandelbaum Barrett PC in Roseland, NJ. Mandelbaum Barrett PC attorneys have been providing clients with sophisticated, hands-on attention to their legal needs - including estate planning, elder care and special needs - since 1930.

WHO'S IN?

6th Annual PLAN|NJ Family Night Out

Join us **August 13, 2026** for this annual outing to watch the Somerset Patriots baseball game. Please arrive by 5:30 PM to join us on the field; the game begins at 6:35 PM. Purchased tickets will benefit PLAN|NJ's pro bono Family Support Services program. To sponsor or to secure sets of up to 15 tickets per group home or other partner, kindly contact Kerry Lee, Director of Operations at 908-575-8300 ext. 21 or kerry.lee@plannj.org. More information and individual tickets are available at www.plannj.org/events.

PLAN|NJ

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WHAT'S NEW FROM PLAN|NJ

• **YOUR TRUST: A PROMISE WE KEEP**, is a new informational brochure for professionals and the families they serve to better understand how PLAN|NJ can support a loved one's future fiduciary needs. Sets of print copies are available upon request, and the document is online here: plannj.org/tools-resources/.

• Recently, PLAN|NJ was presented with an award from the New Jersey State Bar Association. **The 2026 Mary WanderPolo Award for Advocacy Excellence in the field of Elder Law** was presented to PLAN|NJ, referring to the organization as "a tireless fighter for the rights and interests of people with intellectual and developmental disabilities."

"On behalf of our team and board, we are absolutely thrilled to receive this award," said Jason. "Seeing our mission recognized like this is such an honor. It inspires us to work even harder to support our families, neighbors, and friends impacted by disability. Thank you for standing with us!"



PLAN|NJ NEWS is produced twice per year with funding from the New Jersey State Bar Foundation. Thanks for your generous support.



Planned Lifetime Assistance Network of New Jersey

P.O. Box 706

Green Brook, NJ 08812

YES! I want to help PLAN|NJ support individuals with disabilities and their families with the legal and financial planning, care coordination, and self-determination assistance they need and deserve. Enclosed is my tax-deductible donation of:

☐ \$150 ☐ \$100 ☐ \$50 ☐ \$35 Other _____

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Visit plannj.org, click on 'Donate,' or, make your check payable to PLAN|NJ and mail it to **PLAN|NJ, P.O. Box 706, Green Brook, NJ 08812**. We reserve the right to publish donor names in the PLAN|NJ Annual Report unless otherwise requested. If you would like your name removed from the donor list, please check here: _____