



2017 ANNUAL REPORT



# WHO WILL CARE FOR MY LOVED ONE WHEN I'M GONE?



HELPING PEOPLE  
WITH DISABILITIES  
**THRIVE**



PLANNED LIFETIME ASSISTANCE NETWORK OF NEW JERSEY

# WHAT WE VALUE

**PLAN/NJ** keeps the needs of our clients at the center of every decision we make. We strive to be the standard-bearer in an evolving field of coordinated care and fiduciary support providers for people with disabilities and for families who have loved ones living with disabilities. We are under continuous review by our volunteer board of directors; we make regular improvements. We continue to balance evolving research and national trends with our ongoing internal program reviews and feedback from our partners and funders. We offer our clients:

- comprehensive tools of support
  - fiduciary accountability
- person-centered philosophy
  - transparency in all areas
  - state-of-the-art technology
- continuous quality improvement

## COMPREHENSIVE TOOLS OF SUPPORT

- Special Needs Trust (SNT) Administration
- Advocacy
- Case Management
- Home Visit Monitoring
- Guardianship
- Representative Payee

## FIDUCIARY ACCOUNTABILITY

- Loyalty
- Controls
- Accountability
- Laws and Regulations

## PERSON-CENTERED PHILOSOPHY

- Individualized Planning
- LifePLAN Implementation
- Disability Service System Expertise
- Promoting Self-Determination

## TRANSPARENCY

- Accounting and Reporting: Internal, External
- Social Security Administration and Medicaid

## STATE-OF-THE-ART TECHNOLOGY

- Electronic Records
- Electronic Check Payment
- Data Collection
- Cloud-based Data Storage

## CONTINUOUS QUALITY IMPROVEMENT

- Customer Service
- Responsiveness
- Persistence
- Metrics for Optimal Performance



“We rest easier knowing there is a comprehensive plan in place for Rachel to assist others in her day-to-day life as well as her long-term stability and well-being when we are no longer here.”

—Bonnie Brien and Don Piascretta

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# A MESSAGE FROM OUR PRESIDENT

**2017 was a good year** for our son Matt, although he did have unique health challenges which were due, in part, to his growing older with developmental disabilities. Each small change in my son's health presents a new adjustment that we all must make: a new exercise protocol, a new doctor, a new work environment or residential program. And each change makes a world of difference in Matt's sense of his own autonomy and in his overall mood.

So with Matt at the table, we recently gathered the whole family and reevaluated many aspects of the plan that directs his lifestyle. We set a new course of action for the next five years. This plan is on file with the state of New Jersey and is a condition of his receiving crucial public benefits. Our plan is managed by **PLAN/NJ**, a repository of information and a resource, should we need assistance. Most importantly, our plan is a crucial document that helps us all ensure that Matt can thrive.

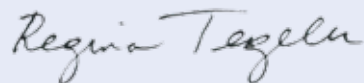
Writing and updating a 'whole person' plan is essential for any family that is responsible for an individual who lives with disabilities. Writing a LifePLAN is an area in which **PLAN/NJ** is uniquely qualified to assist. Benefits for people with disabilities are complex to understand and access — yet absolutely vital for long-term care and for a safe life that is happy, and free from abuse or neglect.

In addition to legal referrals and care coordination, **PLAN/NJ** helped us learn to maximize Matt's eligibility for public benefits and then establish additional fiduciary support for his care. **PLAN/NJ** provides law-related information, awareness, knowledge, and advocacy to families and professionals caring for individuals with disabilities.

**PLAN/NJ** leads the way in defining and standardizing best practices in our complex field. Our Executive Director Ellen Nalven now chairs the National Pooled Trust Standards Committee, supporting even more individuals and families.

If you are a parent or relative of a New Jersey resident who is living with a disability, **PLAN/NJ** will help you provide them with the life they deserve, increasing your peace of mind. Please consider making a gift to **PLAN/NJ** to help advance our mission — to help families answer the question, "Who will care for my loved when I'm gone?"

Sincerely,



Regina Tegeler



# WHO WILL CARE FOR MY LOVED ONE WHEN I'M GONE?

**If your child or loved one lives with a disability, he deserves to receive consistent, well-planned support.** Whether his disabilities are physical, developmental, involving an aspect of mental health, or a combination of several, the arrangements for his happiness, safety and protection must be individualized and comprehensive. His safety, coordinated care, public benefits, and financial stability must continue uninterrupted throughout the entirety of his lifetime, now and after you're gone.

**Planned Lifetime Assistance Network of New Jersey, Inc. (PLAN/NJ)**, recommends a team approach to financial and personal care in order to provide:

- Friendship
- Safety and a sense of security
- Essential medical coverage
- Financial stability
- A suitable home environment
- Education, employment, and participation in community life
- Daily activities and pleasures needed to thrive
- Practical solutions and ongoing support

We know that it's not easy to ensure that these essentials are in place now and in the future. When a consortium of relatives of people living with disabilities came together nearly 30 years ago to establish **PLAN/NJ**, peace of mind and continuity of support were uppermost concerns. Today, more than half of our Board of Directors has a family member who is living with disabilities. We've been in your shoes, and we can help.

## YOUR LOVED ONE DESERVES A PLAN

At **PLAN/NJ**, our top priority is to maintain a singularly focused, powerful commitment to your loved one's needs and your family's wishes. We are dedicated to providing a lifetime of support to individuals with a physical, developmental or mental health challenge, as well as to the families and caregivers who need support, information and allies. Most specifically, we provide you with peace of mind today by helping you know that we'll care for your loved one throughout her life.

**PLAN/NJ** provides lifelong services which can begin today and can continue even after you're no longer here to be your loved one's primary advocate. Our qualified staff can:

- Coordinate health care
- Plan for the future regarding independent living, supportive housing, health, wellness, and appropriate lifestyle choices
- Guide families to protect financial assets that can be used to supplement quality care
- Advocate for clients within the complexities of the health and social service systems
- Support quality of life

Learn more at [www.plannj.org](http://www.plannj.org)

# 2017: LEADING THE WAY

**PLAN/NJ** is recognized as a leader in the effective coordination of a lifetime of assistance for individuals living with disabilities in New Jersey. In 2017, our commitment to best practices in person-centered planning and implementation was acknowledged when Executive Director Ellen Nalven was appointed Co-Chair of the National Pooled Trust Standards Committee. Knowing that people living with disabilities may rise to their fullest potential with the support of an unwavering system of fiscal, legal and care coordination, we help families secure and maintain every available protection for their loved ones.

In 2017 **PLAN/NJ** provided fiduciary support, care coordination and life planning for independent living to 903 people aged 5 to 90. Families of loved ones with developmental and mental health challenges relied on our Private and Pooled Trust Administration, Guardianship, Representative Payee, Home Visit Monitoring, Advocacy and Life Planning services. Educational seminars and special events increased families and professionals' awareness of future planning options. In 2017, we provided the following services:

## FIDUCIARY SUPPORT

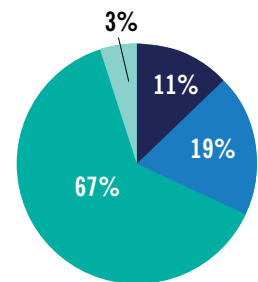
**Trust Administration** PLAN/NJ served as Trustee for 474 Special Needs Trusts with small and large principal values, with deposits ranging from \$25,000 to \$5 million. **PLAN/NJ** increased by 13% the number of clients served in this area and managed \$90 million in trust assets.

**Guardianship** PLAN/NJ provided 36 individuals with guardianship services, visiting monthly and taking responsibility for surrogate decision-making while promoting choice and self-determination, dignity and respect. This service ensures an optimal quality of life in all areas, including health, housing, education, employment, recreation and community living.

**Personal Finances Management** PLAN/NJ served as Representative Payee for 38 clients receiving Social Security benefits, providing assistance to budget, pay bills and maintain financial solvency.

## CARE COORDINATION

**Home Visit Monitoring and Advocacy** 31 clients received regular on-site visits to review the quality of their living arrangements, employment and day centers, and physician and other provider engagement, identifying concerns and ensuring that their preferences were honored. Advocacy efforts provided help to 30 clients to help resolve concerns with state or federal agencies or service providers, to better meet their needs. An additional 176 individuals received short-term monitoring, advocacy and family support services in partnership with the New Jersey Department of Child and Family Services (DCF).



**Funding Sources**  
Fiscal Year 2017 \$1,260,600



## LIFE PLANNING

**Life Planning for Independent Living** 187 families of people with disabilities were supported by **PLAN/NJ** through in-depth technical assistance consultations regarding legal, estate and independent living planning. Of these families, 18 developed a **LifePLAN** to better provide for their loved one's legal, estate and social service support needs in perpetuity with **PLAN/NJ**'s help. These comprehensive programs ensure an individual's lifelong protection and care.

## BEST PRACTICES AND EDUCATION

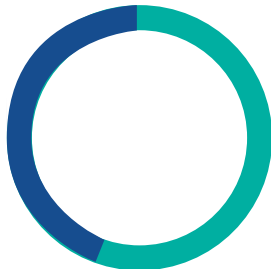
**Sustainability Practices** **PLAN/NJ** pursued internal quality measures:

- Identified ways to increase the size of donations and grants, as well as the number of individual **PLAN/NJ** donors and private foundations. **PLAN/NJ** met with potential state-level foundations, and attended workshops on sustainability for non-profits and enhancing major gifts. The Executive Director and the Development Committee chair worked with fundraisers, development professionals and others to create a development plan
- Instituted a Mailchimp e-mail system to enhance and expand traditional fundraising efforts, including extending the Annual Appeal campaign
- Implemented new technology and systems to track and maintain critical client data

**Educating Families and Communities** **PLAN/NJ** increased outreach and education efforts regarding the policies and best practices for supporting individuals with disabilities:

- Reached 1,355 parents, siblings, potential clients, partners, human service and related agency staff with 26 educational seminars, exhibits and events
- Clarified the purpose and benefits of Special Needs Trusts in improving quality of life while preserving public benefits
- Elucidated legal methods of protecting individuals with disabilities that serve as alternatives to Guardianship
- Described the process of obtaining Guardianship for families who desire it for their children
- Explained the Achieving a Better Life Experience Act (ABLE) as a means of providing people with disabilities more control of finances while preserving entitlements

Time & Services

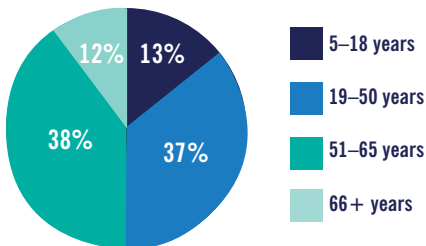


### SOCIAL SERVICES:

- Guardianship
- Home Visit Monitoring
- Advocacy
- Life Planning
- Division of Child Protection and Permanency/Case Management
- Life Planning Seminars

### FIDUCIARY SERVICES:

- Special Needs Trust Administration
- Representative Payee



In 2017, some individuals participated in multiple services to meet their wide-ranging needs; therefore a total of 716 persons, unduplicated, benefited from our supports for safety, security, benefits protection and improved quality of life. An additional 187 individuals and their families gained valuable guidance, advocacy and technical assistance to advance their planning for the future.

## SUPPORT THROUGHOUT THE LIFESPAN

**PLAN/NJ** provides services to individuals ranging from ages 5 to 90.



# CORE SERVICE OPTIONS

**PLAN/NJ** tailors services to fit the distinct needs of the individual with disabilities that we serve and to accommodate the wishes of their family members. When important life decisions are pending—such as where an individual should live, or regarding the provision of medical care—we offer individualized attention and expertise. Our four key service areas include:

## 1. Fiduciary Support

- Special Needs Trust Administration
- Legal Guardianship
- Representative Payee Services

## 2. Future Life Planning and Family Support

## 3. Care Coordination

- Home Visit Monitoring
- Advocacy

## 4. Pro Bono Services Program

## FIDUCIARY SUPPORT

At **PLAN/NJ**, we follow a ‘whole person’ approach to ensure that your loved one is never without the care, comfort, enjoyment, and engagement in life that is his right. We have helped hundreds of families to structure well-designed plans that ensure that their loved ones receive the public benefits they are eligible for and that protect any additional funds in Special Needs Trusts to further support their complex needs.

**Special Needs Trust Administration** **PLAN/NJ** serves as trustee of Third Party and Self-Settled private, stand-alone Special Needs Trusts (SNTs). We also operate a Community Trust that pools funds for third party and self-settled sub-accounts. We will work with families, attorneys and other professionals to determine and administer the most suitable type of trust for your loved one’s needs. As part of our duties administering SNTs, our Trust Services department provides the following services:

- Oversee and monitor client funds to maintain Medicaid and other public benefits
- Develop budgets and spending plans
- Pay bills according to trust document and government benefit rules
- Assist with applications and maintenance of public benefits and other social services
- Monitor health insurance claims and disbursements
- Produce financial accounting and reports as required by public benefits agencies, courts and legal representatives
- Refer families to attorneys or financial planners as needed
- Communicate directly with trust beneficiaries and their representatives
- Advocate for personal needs and hire professionals to assist
- Offer Spanish-speaking services

### Maximizing Public Benefits and Private Support

**Social Security, Medicaid and the New Jersey Division of Developmental Disabilities (DDD), among other state and federal agencies, provide essential services and funding to protect the health and well-being of many individuals with significant disabilities. This support is available to people who meet the disability definitions and “means” criteria. Special Needs Trusts are financial accounts that enable family funds to be set aside to supplement essential public benefits and services, and are allowable when the funds from the Special Needs Trust are used to improve the quality of life for their loved one. If a loved one is living with significant disabilities, establishing the trust early on will ensure peace of mind for families as they consider how to manage their assets on behalf of their family member, now and in the future.**

## Fiduciary Support *(continued)*

**Legal Guardianship** The need for a legal guardian is determined by due process in courts of law. Since establishing legal guardianship may remove individual rights, it should only be considered once other alternatives have proven ineffective or are unavailable. As a legal guardian, **PLAN/NJ** protects real and personal property, including anything that may be under ownership dispute.

We intervene when no family members are able to serve in this capacity. We prioritize supported decision-making to achieve the stated goals and help to ensure that individuals have the necessary supports while respecting their wishes and preferences. As Legal Guardian, **PLAN/NJ** will:

- Promote client choice, self-determination, dignity and respect
- Visit at home once per month at minimum and provide ongoing case management
- Ensure quality of life in health, housing, education, employment, recreation, community living and other areas
- Take responsibility for surrogate decision-making
- Protect clients from fraud or undue influence
- Protect personal property

**Representative Payee Services** When an individual needs assistance with budgeting and bill paying, we manage their Social Security and other income ensuring their financial solvency and protecting them from potential financial exploitation. As your loved one's representative payee, **PLAN/NJ** will:

- Ensure that basic requirements are met for food, clothing and shelter
- Assist with budgeting and other regular financial management
- Monitor and assist with paying bills
- Submit required reports to the Social Security Administration and other governmental agencies

## FUTURE LIFE PLANNING AND FAMILY SUPPORT

When families face the reality that they will not always be around to advocate for their relative who is living with a disability or mental illness, many questions and concerns arise. **PLAN/NJ** works closely with families to design a comprehensive **LifePLAN** that addresses all aspects of life. This planning process defines roles and responsibilities for independent living, as well as necessary legal and financial supports. During the collaborative development of a **LifePLAN** document, several crucial questions asked by families are answered in-depth to ensure uninterrupted support. These include:

1. Who will do for him the many things that we do now?

2. How will she continue to receive the quality care and feel the life satisfaction she now enjoys at home, at school, at work and in her day program?
3. What do we need to put in place to ensure he remains financially comfortable?
4. Will a Trustee and/or Representative Payee be needed to manage her financial responsibilities?
5. Where will she live and with whom?
6. Who will make sure that he receives good healthcare and talk with medical professionals if he cannot?
7. Who will arrange for her to practice her religious faith, observe her birthday and holidays, arrange for social/recreational activities, and ensure that she thrives?
8. Who will consider and adhere to his preferences when making future life decisions?
9. What else does she need to feel happy and secure?

Once a **LifePLAN** is in place, our role is to coordinate and implement that plan according to the family's wishes, while keeping your loved one's needs and preferences at the forefront.

## CARE COORDINATION

An important hallmark of **PLAN/NJ** services is our commitment to regular contact with those individuals with disabilities and mental illness who receive services from us. Our experienced service coordinators provide ongoing monitoring for people who have no living relatives or whose family members cannot make regular visits. We offer unwavering care coordination, crucial social engagement and personal support. We are the first to respond when crises or emergencies occur. We will function as the eyes and ears of distant relatives, make regular home and day program visits, and communicate with families after each visit. **PLAN/NJ** offers the following care coordination services:

### Case Management/Home Visit Monitoring/Advocacy

- Coordinate the efforts of family members as they advocate for their loved ones
- Negotiate the disability and mental health service systems
- Advocate for appropriate services related to housing, employment, day programs, medical, financial, legal and other providers
- Accompany clients to medical and other appointments and advocate on their behalf



**Person-centered practices  
increase our clients'  
health, happiness and  
sense of well-being.**



“We would like to sincerely thank PLAN/NJ for everything — your services, your help and your caring. We feel comfortable, relieved and secure knowing someone trustworthy will always be there for our brother — even when we can’t be.”

—*Siblings of PLAN/NJ client*

## Care Coordination *(continued)*

- Promote healthy life decisions
- Organize private home health care, nursing home placements and hospice care as needed
- Represent family concerns and assist in developing person-centered support
- Assist with applications for public benefits and other social services
- Maintain contact during life transitions such as a change in housing or the loss of a parent

## Social Engagement

- Accompany clients on outings, recreational activities, shopping trips
- Celebrate birthdays, holidays, and other special occasions
- Encourage clients to maintain relationships with neighbors, family and friends

## Personal Support and Emergency Response

- Act as “first responder” when need for assistance arises
- Confirm financial obligations are met and personal needs are addressed
- Step up personal contacts when health or other crises occur
- Establish supports necessary for as much independence as possible
- Maintain access to emergency or planned housing, education, food, medical, financial and other supports from the Social Security Administration, Medicaid, Division of Developmental Disabilities, Division of Mental Health Services, housing authorities, and others
- Protect an individual’s safety and well-being during natural disasters

## PRO BONO SERVICES PROGRAM

PLAN/NJ’s Pro Bono Services Program responds to the needs of a small group of individuals with no available resources to fund vital services including Guardianship, Home Visit Monitoring, Advocacy and/or Representative Payee. Donations to PLAN/NJ that are earmarked for this program help ensure that more of the thousands of the individuals living with disabilities in our state will benefit from the independent living planning services that truly make a difference in their lives, both now and in the years to come.

For more information on PLAN/NJ’s Core Service Options, visit [www.plannj.org](http://www.plannj.org) or call 908-575-8300.

Each year, PLAN/NJ collaborates with stakeholder agencies to increase awareness of the legal, estate and independent living planning needs of people with disabilities through free seminars and workshops held throughout the state.

In-person family and community engagement activities are vital to help more people understand disability law, available public benefits, legal and financial protections, and care coordination. They reinforce families' abilities to plan for the future of their loved one, put required services in place, honor their preferences, and help them thrive.

Our seminars and events attract family members, individuals with disabilities, and professionals in human services, schools and other organizations. Our seminar topics include how to:

- Plan legal, estate and independent living for the future care of people with disabilities and learn why planning is important
- Maximize private resources and public benefits to enhance their housing and other quality of life decisions
- Protect and exercise their legal rights to medical, residential, education and employment services
- Utilize Special Needs Trusts (SNTs) to improve quality of life while preserving access to essential public benefits
- Obtain Guardianship and alternative legal protections like Powers of Attorney, Representative Payee, Trustee for Special Needs Trusts, and Psychiatric Advanced Directives
- Use person-centered practices to promote self-determination for loved ones with disabilities

# FAMILY AND COMMUNITY EDUCATION ACTIVITIES

“The presenter of this seminar on Special Needs Trusts was excellent. I was given crucial information that was easy to understand.”

—Seminar attendee

“This seminar on Guardianship was comprehensive and extensive in relaying and explaining services so that I understand what I need to do. I was uninformed in many of these areas and will make some changes. Please come back again!”

—Seminar attendee

# STORIES OF PERSON- CENTERED SERVICES

Life planning helps families articulate what their loved ones prefer and require so that caring professionals can better provide for those needs in the future.



**PLAN/NJ** supports hundreds of individuals living with disabilities throughout New Jersey. Here are just three stories that depict the many ways our services protect and provide for our clients' needs and interests.

## LIFE PLANNING SERVICES

A **LifePLAN** is a comprehensive, person-centered planning document that contains all of the important details about the life of a person with a disability. It describes who the person is, what is valued most, and what is wanted and needed for the person to live a happy and fulfilling life. The person's desires are the focus of this plan, as well as the family's wishes for him or her. It includes vital information that oftentimes only the parent or guardian knows and details everything they do on the person's behalf. All of this is consolidated into the **LifePLAN**, which is used to govern future support needs when the original caregivers are no longer available to provide support coordination and advocacy. The **LifePLAN** does far more than simply project the person's financial needs: It is an essential tool to guide the trustee, guardian, family members and support personnel who will be making decisions in the future. The first client story below illustrates the importance of a **LifePLAN**.

### Client Story: Rachel

**Rachel** is an enthusiastic and social young woman in her early 30s who most values spending one-on-one time engaged in activities with her parents and respite care providers. Although she is unable to speak using sentences, she is highly communicative through her facial expressions, body language, and short phrases. Her cerebral palsy and epilepsy require her to use a wheelchair most of the time and rely upon others to assist with all areas of personal care, including bathing and dressing. She lives in a group home.

Rachel enjoys many activities including arts and crafts and cooking. Another favorite activity is watching TV programs featuring handsome young men and she is also fond of looking at books with photos of boy bands such as One Direction. She enjoys having her nails painted. Rachel uses an iPad with limited assistance which her parents upload with photos of her activities to share with others. The highlight of her summers is attending Camp Merry Heart, an activity her parents want to ensure she continues to do. Rachel also loves to attend live performances, especially those that feature singing and dancing. She has been to numerous Raritan Valley Community College performances and has also attended shows at other local theaters. Rachel likes going to the movies and out to eat. This information represents a small portion of Rachel's **LifePLAN**.

Rachel's sister is the successor guardian; however she currently lives in Vermont, works full time and, having lived further away for 10 years, is not as familiar with the specific details of Rachel's day-to-day life. As a result,

her parents want **PLAN/NJ** to provide home visit monitoring services when they are no longer here. The **LifePLAN** acts as a guide for **PLAN/NJ** staff and other caregivers, who need to fully understand Rachel's needs and preferences to ensure her quality of life in her parents' absence.

## GUARDIANSHIP AND HOME MONITORING SERVICES

**PLAN/NJ** also provides guardianship and home monitoring services, as demonstrated in the stories below.

### Client Story: John

**John** is in his late 60s and is an avid fan of baseball, which he regularly watches on television. His favorite team is the NJ Devils and one of his most cherished activities is attending at least one game per season. Another source of enjoyment is music. His tastes are eclectic and he has more than 100 songs on his iPod. John has a developmental disability as well as significant medical issues that require ongoing care. A **LifePLAN** was done shortly before his mother passed away. As a result, **PLAN/NJ** knew of John's medical needs and advocated for him to live in a medically-oriented group home versus an institutional setting. John receives home visit monitoring services from a **PLAN/NJ** staff member who reviews his medical charts, discusses his care and medications with on-site professionals, ensures his treatments are consistent and appropriate, and chats with him about it all, including baseball scores and statistics. On the occasions when John needs treatment in a hospital, **PLAN/NJ** staff visits him.

### Client Story: Robert

**Robert** is a thoughtful, energetic man in his mid-50s. He shares a home in a quiet suburban neighborhood with other adults with disabilities, as well as with a manager and 24-hour staff. Residents share a backyard garden, a cat and a piano, which he particularly likes to play. He loves any type of animal and claps excitedly when he sees one on television or in the community. He also enjoys painting and proudly displays his artwork in his room. He is very attached to the manager of his home, a staunch advocate for all the residents who has been a consistent force in his life for several years.

Robert has autism and does not communicate verbally. He initially experienced a difficult transition after his mother passed away because no one knew or understood his non-verbal cues; information that would have been in a **LifePLAN**. As his guardian, **PLAN/NJ** visits Robert at least once per month. The **PLAN/NJ** Service Coordinator has open communication with his staff and attends all planning meetings to advocate on his behalf and to ensure his needs are met.



**PLAN/NJ** staff visit clients where they live, spending time to better understand their needs and reviewing best practices and procedures on their behalf.

Supervised daily life helps many **PLAN/NJ** clients live safe, fulfilling and optimal lives.



# A MESSAGE FROM OUR EXECUTIVE DIRECTOR



I recently presented at a national conference for Pooled Special Needs Trust (PSNT) organizations about relevant nonprofit business development topics including diversification of income streams, marketing to organizational strengths and was honored to discuss the rationale behind our most unique and increasingly vital activity: the writing of **LifePLANS** for individuals with disabilities. Lessons we've learned from nearly 30 years of serving clients and families are helping us break new ground in person-centered support and are informing the work of the National Pool Trust Standards Committee.

Thank you for engaging with me in this important work to benefit all people with disabilities. Every day, I am motivated to do my job well and to share best practices with others, because of the clients, families, peers, mentors, and donors who've shown me the way. If you've just come across **PLAN/NJ**, we're available today to help you begin planning for a safer, more secure and thriving life for your loved one.

I hope you'll read about new **LifePLAN** partners Bonnie, Dan and Rachel, whom we featured in the Annual Report this year. Our poignant stories of Guardianship clients John and Robert show how we help people living with disabilities to thrive. All are prime examples of families who sought partnerships with **PLAN/NJ** that will grow over time.

**PLAN/NJ** is in a constant state of reflection and improvement on behalf of our clients. Our work is guided by our Board of Directors, more than half of whom have a loved one with a disability. I'm happy to say that our excellent team of staff leads the way in pooled special needs trust administration and care coordination support services. We are here to help you answer the question, "Who will care for my loved one when I am gone?" — now and in perpetuity.

Call me to discuss your family member's needs at **(800) 704-PLAN** or visit [www.plannj.org](http://www.plannj.org) for more information or to make a donation.

Sincerely,

A handwritten signature in black ink that reads "Ellen B. Nalven". The signature is written in a cursive, flowing style.

Ellen B. Nalven, M.Ed.



# GET INVOLVED!

**A growing number of individuals are living with one or more disabilities.** Nearly 25% of adults living alone under age 65 are identified as having a disability, and nearly 43% of families with adults over 65 have at least one member living with a disability<sup>1</sup>. Many face complex medical, living and financial decisions and are challenged to plan and prepare for these aspects of their lives, leaving them vulnerable to exploitation and substandard care. Every day, **PLAN/NJ** provides vital direct services and advocacy for hundreds of New Jersey residents and their families. We currently serve 903 individuals and the need is great to serve many more.

As a 501(c)(3) nonprofit organization, **PLAN/NJ** relies upon **YOUR** support to meet the growing demand for our services.

Won't **YOU** join our efforts?

**YOUR** tax-deductible donations — to either or both of the following areas — will help us to serve individuals and their families, now and in the future.

- Our **Pro Bono Services** Program supports **Guardianship, Home Visit Monitoring** and **Representative Payee Services** for individuals who otherwise have no ability to pay the related fees
- Our **General Operating Fund** and related new **Endowment Campaign** help us build organizational strength and stability

With **YOUR** support, we will be able to assist more families who need our assistance, so please help us spread the word about **PLAN/NJ**.

**ALL** of us, working together, can provide a lifetime of coordinated care for people living with disabilities.

<sup>1</sup> Modified from "Disability in U.S. Households, 2000–2010: Findings from the National Health Interview Survey." Barbara M. Altman, Global Evaluation and Applied Research Inc. and Debra L. Blackwell, Ph.D.; published online January 11, 2016 at PubMedCentral, National Library of Medicine, National Institutes of Health. Original statistic: 2010 U.S. Census Bureau.

**YOU can help by making  
an electronic donation  
today at [www.plannj.org](http://www.plannj.org).**

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