

PLANNED LIFETIME
ASSISTANCE NETWORK
OF NEW JERSEY



PLAN/NJ@30

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

2018 ANNUAL REPORT



OUR MISSION & VALUES

Planned Lifetime Assistance Network of New Jersey, Inc. (PLAN/NJ)

helps the families of individuals living with disabilities in New Jersey to answer the question, “Who will care for my loved one when I am gone?”

WE BELIEVE that all people with disabilities have a right to experience the highest possible quality of life and to receive the services that they and their families desire throughout the lifespan.

WE DELIVER SERVICES by forming a circle of support comprised of families, social service providers, attorneys, financial advisors, and trust administrators. This enables us to institute specific plans of action for each individual we serve, maintaining necessary services while enhancing their quality of life.

WE VALUE a person-centered philosophy, compassionate and comprehensive care coordination, transparency, accountability, state-of-the-art systems, and continuous improvement.

“Parents choose us because we get to know each client and build a personal relationship. We help our clients get through crises in positive ways, like helping avoid the loss of employment, or addressing a personal or health need. We also guide siblings in how they can help their family member.”

— Jason Miller, Director, Social Services

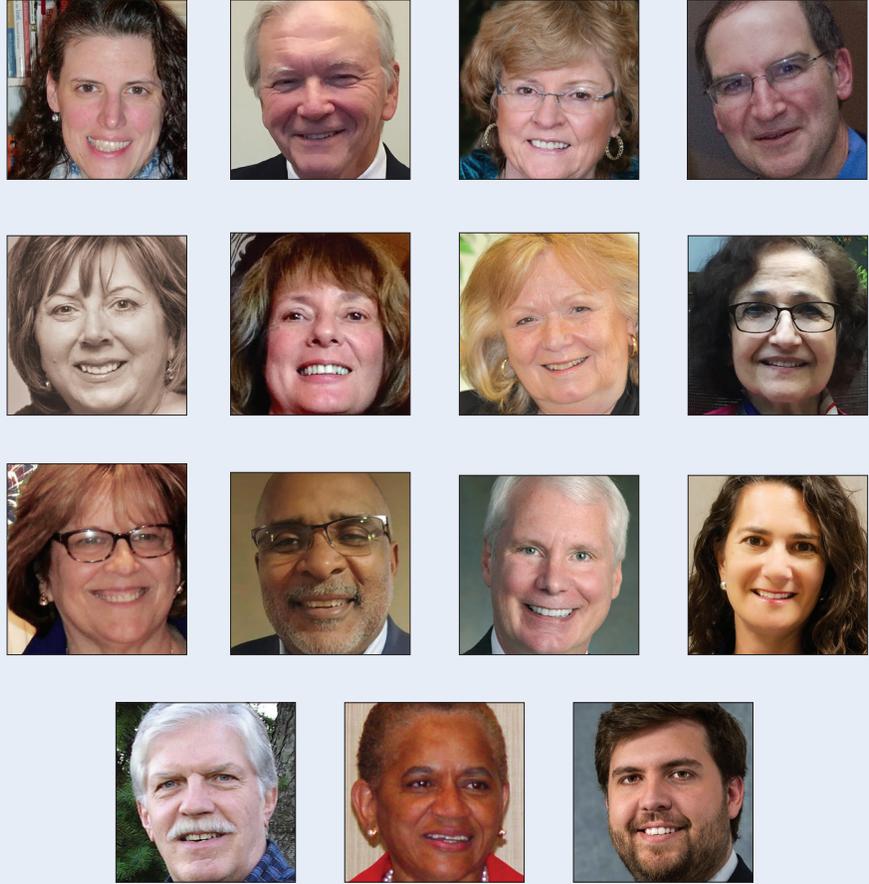
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2018-19 BOARD OF DIRECTORS



(left to right, top to bottom)

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LETTER FROM OUR PRESIDENT

by Samantha J. Herrick,
Ph.D., CRC, NCC, ACS

My initiation to the field of disability services was prompted by personal experience. While in college, I was diagnosed with Attention Deficit Hyperactivity Disorder, and then later underwent unsuccessful back surgery, leading to a chronic pain diagnosis. By 24, I was thus diagnosed with two different types of challenges: one neurological and one physical.

With little clarity about what I wanted to do with my life, providence stepped in. I was hired as an “Employment Specialist,” which involved career counseling, placement and advocacy for individuals with disabilities who were seeking employment. Eureka!

My career and lifelong passion began in earnest, and I served in a number of disability services positions in community-based agencies and higher education. I became a Rehabilitation Counselor educator because I wanted to have an impact on the next generation of disability services providers. I wanted them to be not just good at their jobs, but really good, because the people we serve deserve the very best. Since joining Rutgers, The State University of New Jersey, School of Health Professions almost eight years ago, I have taught and mentored more than 200 master’s level students, and trained hundreds of disability service providers at conferences.

I was invited to join the [PLAN/NJ](#) board five years ago, and it has been a rewarding experience to work with this group of highly skilled, intelligent, dedicated and passionate people. I am honored and privileged to now serve as President of the Board and am humbled by the trust bestowed upon me by my fellow board members, most of whom are also family members of individuals with disabilities.

In difficult times, the most vulnerable among us inherit the greatest burdens. Our friends, family members and neighbors with disabilities have been disproportionately impacted by fluctuations in our current economic and social climate, including significant cuts to social services budgets. There has been a reorganization of our state’s developmental disabilities and mental health systems, and implementation of a new fee-for-service funding model. This upheaval has caused great anxiety over how these changes will impact our loved ones.

In the past 20 years, the explosion in the numbers of individuals diagnosed with Autism Spectrum Disorder has been extraordinary. Two decades ago, autism was considered a rare condition and the diagnoses rate was 1 in 10,000. In 2018, The Centers for Disease Control announced that the rate was 1 in 59. This demographic shift is prompting a demand for monetary resources, innovative educational practices, and myriad services and supports to ensure the best possible outcomes for individuals with autism and their families.

Now is the time to give to [PLAN/NJ](#), New Jersey’s only comprehensive not-for-profit future life planning and fiduciary organization for individuals with a variety of significant disabilities and their families. Your care, concern, and support are greatly appreciated and essential to provide for the lifelong support of individuals with disabilities.

If your loved one lives with a disability, you may have more questions than answers about how to maintain her health, independent living and happiness – now and in the years to come. What you do know is that she needs and deserves to receive consistent, well-planned support. Arrangements for her safety and protection must be individualized and comprehensive, whether her disabilities are physical, developmental, involving an aspect of mental health, or a combination of several. At **PLAN/NJ**, we stand firmly with you to ensure that responses to her care needs continue without interruption. We are a trusted friend and expert for individuals, siblings and families; we navigate the changes and complexities in the legal, financial, health care and supportive housing and employment systems. Our organization is stable and strong, and we stand ready to help you maintain your loved one's safety, coordinated care, public benefits and financial stability, now and after you're gone.

Planned Lifetime Assistance Network of New Jersey, Inc. (PLAN/NJ) recommends a team approach to planning for the financial and personal care of individuals with disabilities. Our comprehensive care coordination services provide individuals and families the safety and sense of security all people deserve. Specific services include Special Needs Trust Administration, Legal Guardianship, Home Visit Monitoring, Advocacy, Life Planning Consultation, and Representative Payee for Social Security Benefits. We help families achieve the following:

- A suitable home environment
- Education, employment, and participation in community life
- Essential medical coverage and financial stability
- Ongoing friendship, plus daily activities and pleasures needed to thrive.

30 years ago, a consortium of relatives of people living with disabilities came together to establish **PLAN/NJ**. Then and now, your loved one's continuity of support — and your peace of mind — are our uppermost concerns. More than half of our Board of Directors has a family member who is living with one or more disabilities. We understand your concerns and needs. We stand firm in the face of change, and we are here to help.

PLAN/NJ is dedicated to providing a lifetime of support to individuals who live with one or more physical, developmental or mental health challenges. Our top priority is to maintain a singularly focused, powerful commitment to your loved one's needs and your family's wishes. As families and caregivers, you also 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 lifetime.

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

- Coordinate his ongoing health care needs, which will change over time
- Plan for his future regarding independent living, supportive housing, health, wellness, and appropriate lifestyle choices
- Guide your family to protect financial assets that can then be used to supplement the quality of your loved one's care
- Advocate for him within the complexities of the health and social service systems
- Keep him safe, supported and thriving, both at home and in the community.

Learn more at www.plannj.org

YOUR LOVED ONE DESERVES A PLAN

PLAN/NJ @ 30

WHO WILL CARE FOR MY LOVED ONE

WHEN I'M GONE?

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2018: STANDING FIRM IN TIMES OF CHANGE

This year, dramatic shifts occurred in public support for individuals with disabilities. Families and agencies are confused and scrambling to keep up with new rules and regulations. While the priorities of state and national government agencies are being reexamined and changes in funding structures are being implemented, we are standing firm with families, providing the expertise to navigate these upheavals. Our priority, as always, is to ensure uninterrupted future planning and support for the individuals and families we serve.

Our 2015-18 Strategic Plan articulated goal areas of Growth & Sustainability, Quality Assurance, and Governance to sustain our ability to scale our organization and lead during times of change.

With significant achievements in these goal areas, we are entering our next phase with enhanced quality controls, and with greater capacity to scale our services to benefit more individuals. Now more than ever, we encourage families to consider how we may be able to support them in the coordination of the fiscal, legal, housing, employment and health care services that their loved ones need. Our coordinated supports provide them with protection from abuse, neglect and exploitation; foster their engagement in the community; and help them thrive.

In 2018, **PLAN/NJ** provided fiduciary support, life planning and care coordination on behalf of 982 individuals who live with intellectual, developmental and mental health challenges. Our services include stand alone and pooled Special Needs Trust Administration, Guardianship, Representative Payee for Social Security Benefits, Home Visit Monitoring, Advocacy and Life Planning Consultation. We regularly delivered multiple services to 715 persons, unduplicated, who benefited from our uninterrupted supports for safety, security, benefits protection and improved quality of life. This represents an overall service increase of more than 8% this year. 267 individuals and families received in-depth technical assistance life planning consultations. We also increased more families' and professionals' awareness of their available future planning options through 20 educational seminars and exhibits, reaching an additional 1,219 parents, siblings, potential clients, partners, human service and related agency staff.

The Executive Director participated in a national think tank to develop the Life Passages Planning initiative and on the planning committee for the 2018 National Conference on Special Needs Planning and Special Needs Trusts, where she co-wrote and presented a paper entitled "Changing Times, Changing Climate: Keeping Your Pooled Trust Relevant." Her leadership participation keeps **PLAN/NJ** on top of national priority issues and best practice social service delivery needs.

TRUST ADMINISTRATION

- Served as Trustee for 487 Special Needs Trusts with deposits ranging from \$25,000 to \$4 million
- Managed \$95 million in trust assets
- Enhanced quality of life and supported health and wellbeing while protecting government benefits

REPRESENTATIVE PAYEE

- Acted as Representative Payee for 41 clients receiving Social Security benefits, providing assistance to budget, pay bills and maintain financial solvency and housing security, as well as providing reports to the Social Security Administration

GUARDIANSHIP

- Served 34 individuals with monthly visits and surrogate decision-making, promoting choice and self-determination, dignity and respect
- Ensured an optimal quality of life in health, housing, education, employment, recreation and community living

CARE COORDINATION

- Provided monthly home visits to assess the quality and safety of living arrangements, employment and day centers, and the level of physician and other provider engagement for 34 people; identified client concerns and ensured that their preferences were honored
- Advocated for 21 clients to resolve issues with service providers, or state or federal agencies
- Provided short-term monitoring, advocacy and family support services to 126 individuals in partnership with the New Jersey Department of Child and Family Services (DCF)

FUTURE PLANNING FOR INDEPENDENT LIVING

- Offered 267 families in-depth technical assistance consultations regarding the future independent living, legal and financial needs of their loved ones with disabilities. This represents a 43% increase in these services over last year. Of these families, 20 developed a comprehensive **LifePLAN** this year to provide for their loved one's needs in perpetuity.

PREPARING TO CELEBRATE 30 YEARS OF SERVICE

PLAN/NJ prepared to celebrate 30 years of service to individuals with disabilities and their families. The event will be held on November 1, 2018 and will recognize New Jersey's advocacy leaders by presenting the following awards:

Legislative Advocate of the Year Award: **Steve Sweeney, Senate President**

Trailblazer Award: **C. Vivian Stringer, Head Coach, Women's Basketball, Rutgers University**

Fred R. Patterson Parent Advocate Award: **Mercedes Witowsky, Executive Director, New Jersey Council on Developmental Disabilities**

Outstanding Staff Member Award: **Nadine Hoston, Service Coordinator, PLAN/NJ**

Life Planning Partner Awards: **Brandon Smith, Carmelita and Daniel Blackford, Joseph Kearns**

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CORE SERVICE OPTIONS

PLAN/NJ tailors services to fit the distinct needs of each 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 compassionate and comprehensive care coordination, including individualized attention and professional expertise. Our key service areas include fiduciary support; future life planning and family support; care coordination; and our 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 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 work with families, attorneys and other professionals to determine and administer the most suitable type of trust for your loved one’s needs. On behalf of families and individuals with disabilities, our Trust Services department performs the following duties:

- Oversee and monitor client funds to maintain 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
- Guide families to review a directory of attorneys and financial planners
- Communicate directly with trust beneficiaries and their representatives
- Advocate for personal needs and hire professionals to assist
- Offer Spanish-speaking services.

Legal Guardianship The need for a legal guardian is determined by due process in courts of law. As Legal Guardian, **PLAN/NJ** will:

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

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. We assist when no family members are able to serve in this capacity.

Representative Payee for Social Security Benefits When an individual needs assistance with budgeting and bill paying, we manage his Social Security and other income to ensure financial solvency and protect him 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
- Communicate with him, monitor expenses and pay bills
- Submit required reports to the Social Security Administration and other governmental agencies.

FUTURE LIFE PLANNING AND FAMILY SUPPORT

Many questions and concerns arise when families realize that they will not always be around to advocate for their relative who is living with a disability or mental illness. **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:

- Who will do for him the many things that we do now?
- 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?
- Where will she live and with whom?
- Who will make sure that he receives good healthcare and talk with medical professionals if he cannot?
- Who will arrange for her to practice her religious faith, observe her birthday, celebrate holidays, arrange for social/recreational activities, and ensure that she thrives?
- Who will consider and adhere to his preferences when making future life decisions?
- Who will make sure the family's funeral traditions and wishes are carried out?
- What do we need to put in place to ensure he remains financially comfortable?
- Will a Trustee and/or Representative Payee be needed to manage her financial responsibilities?
- 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.

(continued)

CARE COORDINATION

An important hallmark of **PLAN/NJ** is our commitment to maintaining 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 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
- Travel to visit individuals in their homes; accompany clients to medical and other appointments; and advocate on their behalf
- Promote healthy life decisions
- Organize private home health care, nursing home placements and hospice care
- 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 and 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 that her financial obligations are met and personal needs are addressed
- Increase personal contact with individuals when health or other crises occur
- Establish necessary supports while encouraging independence
- Maintain each individual’s 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 his safety and well-being during natural disasters.

PRO BONO SERVICES TO PROMOTE INDEPENDENT LIVING

PLAN/NJ responds to the needs of a small group of individuals who have no other available resources with our program *Promoting Independent Living for Individuals with Disabilities*. Supported in part by grants from generous foundations and donors, this program funds the vital services they need, which may include Guardianship, Home Visit Monitoring, Advocacy, Representative Payee for Social Security Benefits and/or Life Planning Consultation. Donations that are earmarked for this program help ensure that more of the thousands of the individuals living with disabilities in New Jersey will benefit from our comprehensive care coordination. This support can truly make a difference in the life of an individual with significant disabilities, now and in the years to come.

For more information on **PLAN/NJ**'s Core Service Options, visit www.plannj.org or call 908-575-8300.

We continue to collaborate with stakeholder agencies to increase awareness of the legal, estate and independent living planning needs of people with disabilities. These alliances help us to provide free related seminars and workshops throughout the state. Family and community engagement activities that take place in person 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.

This year, 20 seminars and exhibits conveyed the importance of legal, estate, and independent living planning to more than 1,200 individuals. Target audiences included people with disabilities, family members, school and human services professionals and other interested parties. Topics included:

- Using person-centered practices to promote self-determination for loved ones with disabilities
- Planning legal, estate and independent living for the future care of people with disabilities, and learning why planning is important
- Helping vulnerable individuals protect and exercise their legal rights to medical, residential, education and employment services
- Maximizing private resources and public benefits to enhance decisions regarding housing and other quality of life components
- Utilizing Special Needs Trusts (SNTs) to improve quality of life while preserving access to essential public benefits
- Obtaining Guardianship and alternative legal protections like Powers of Attorney, Representative Payee, Trustee for Special Needs Trusts, and Psychiatric Advanced Directives.

EDUCATING FAMILIES, PROVIDERS AND COMMUNITIES

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PILLARS OF STRENGTH: SOCIAL SERVICES AND TRUST ADMINISTRATION



Jason
Miller

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Two **PLAN/NJ** departments—Social Services and Trust Administration—are pillars of strength in support of our clients’ unique and complex needs. These teams guide the future planning, fiduciary supports and care coordination that people with disabilities and their families need and deserve.

The Social Services department, led by **Jason Miller**, Director, delivers uninterrupted, person-centered services. Staff members advocate for clients’ wishes and needs, helping them to remain engaged in their community and in contact with extended friends and family. The team of six assists in many ways, such as helping an adult move into a supervised apartment; organizing personal travel; offering grief support; applying for Supplemental Security income (SSI); and encouraging self-determined best health care practices.

The Trust Administration department, led by **Nancy Dilliplane**, Director, serves clients and their families via Third-Party Trusts (funded with assets belonging to someone other than the beneficiary) and Self-Settled Special Needs Trusts (funded with the beneficiary’s personal assets). These may be established as stand-alone trusts (with the trust document prepared by the family’s attorney) or by using the **PLAN/NJ** Community Trust, a Pooled Trust. Under the Director’s purview, a staff of seven provides support and services to clients (bill payments, purchases, service coordination) as well as bookkeeping and administrative functions.

Social Services Department: A Positive Impact on Clients’ Daily Lives

Jason began his career in the field of disabilities at age 18 as a residential services manager and majored in psychology while in college. He takes pride in helping people every day. “We genuinely impact their lives so clients have a sense of security and see immediate results with needs or concerns. We help them get through crises in positive ways, like avoiding loss of employment, or addressing a personal or health need, and we guide siblings in how they can help their family member,” says Jason. His team coordinates with case managers, employers, support coordinators, residential and vocational agencies, and government entities, among others. “Parents choose us because we get to know each client and build a personal relationship,” he says.

Each year, according to agency records, Social Services staff travels about 73,500 miles within New Jersey—akin to driving three times around the world at the equator!—to maintain home visit monitoring and Guardianship responsibilities. Clients who live in their own homes have sufficient support to live well, and those who live in group homes or supportive housing benefit from compassionate oversight at its highest level.

Regular on-site client visits allow staff to assess the quality of living arrangements, employment and day centers; to monitor physicians and other providers; and to resolve concerns and confirm good delivery of services. In-person advocacy efforts help our clients to make healthy life decisions and ensure their preferences are honored. Staff may take clients

out to celebrate a special occasion, help with every day errands, and provide safe, reliable transportation to appointments ... all according to clients' individual needs.

Trust Administration Department: Providing Long-Term Security

Nancy has a BA in Psychology, Education and Hispanic Literature and has been with **PLAN/NJ** for 17 years. She oversees fiduciary services for 500 clients, building on a prior work history of providing financial appraisals of aircraft for major banks/private investors, airline reservation and quality control, and office management. "When my children were small, I needed a part-time position near home, and immediately loved my job at **PLAN/NJ**. I related very well to the mission," she says.

With 15 years as sole caregiver for family members, Nancy's work has personal meaning. "My father had dementia and used a wheelchair, my mother was a bilateral amputee, and they lived with me until their deaths. I also cared for my aunt, who had chronic heart disease and visual impairment, because she had no nearby family members. I relate to the challenges and worries that families encounter personally and within social service systems."

At first, she did administrative work, creating client databases and assisting with trust administration, which gave her extensive knowledge of **PLAN/NJ**'s functions and client histories and needs. "I appreciate how our services impact our clients and their families, which is a tremendous help when administering the trusts," Nancy says.

Staff may arrange to sell a client's home or advocate with state agencies regarding benefits. Clients may need help with eviction notices, transportation emergencies, or with ordering household items. Duties include a wide range of responsibilities such as explaining trust administration policies and procedures to families/clients/professionals; reviewing trust documents; providing guidance on public benefits and the trust preparation process; collecting trust assets for accounts; and coordinating services with other **PLAN/NJ** departments.

"Trustees must maintain communication and interaction with their clients to provide the best assistance," Nancy explains. "Our staff has a thorough understanding of public benefits and regulations as well as the laws that govern trusts. We work in concert with our Social Services Department, which oversees and provides guardianship, home visit monitoring and representative payee services."

"From the start, I saw **PLAN/NJ**'s spirit and perseverance, and it has never faltered," says Nancy. "I see accomplishing even more for our clients in the future by expanding our quality of service to higher levels. Since many families are unaware of the peace of mind **PLAN/NJ** provides, I see outreach and education as major goals. When families tell me they're glad we exist, I feel great pleasure and pride in what we do for our clients and welcome the sighs of relief we provide to their families."



**Nancy
Dilliplane**

JUDY'S* STORY

Judy lives with a developmental disability and was under pressure while her mother's health was poor. At her place of employment, the number of candy boxes she needed to pack per hour increased dramatically. The combined stress and anxiety was impacting her job performance, but when the PLAN/NJ staff advocated on her behalf, Judy's manager temporarily adjusted expectations. Judy kept her job, which is essential to her well-being.

* Name changed for confidentiality



A MESSAGE FROM OUR EXECUTIVE DIRECTOR

Dear PLAN/NJ Supporter,

As **PLAN/NJ** celebrates its 30th year serving people with disabilities and their families, the Board of Directors and I have taken the opportunity to reflect on the shared privilege of steering this impactful organization.

Back when we began, self-determination was less often encouraged, and supported living and care coordination services were difficult to obtain. Until The Arc of New Jersey helped organize a consortium of families to help establish **PLAN/NJ**, family members could not readily answer the question: “Who will care for my loved one when I’m gone?”

There is much to celebrate, thanks to the efforts of tireless legislative and parent advocates who defend and expand the rights of individuals with disabilities, and to the countless volunteers and staff who have moved forward despite continual challenges. Thank you for continuing to inspire me as we link arms 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 people with disabilities, families, peers, mentors, and donors who’ve shown me the way.

PLAN/NJ is available to anyone with questions and concerns who needs specific or general guidance to better care for their loved one who lives with a disability. We can begin today to help you start planning for a safer, more secure and thriving life for your loved one.

PLAN/NJ works hard to ensure that even our most vulnerable clients live to their best potential and are protected from homelessness, neglect, abuse or exploitation. I hope you’ll read about our Trust Administration and Social Service divisions, which meet and exceed every standard that is set for these areas. The National PLAN Alliance articulated its best practices and policies based in part on the leadership that we have shown in New Jersey.

PLAN/NJ is entering a strategic planning phase which will guide us into 2021 and beyond. This and all of our work is guided and governed by our Board of Directors, more than half of whom have a loved one with a disability. You can be confident that **PLAN/NJ** will continue to be here now and in the future to help you answer the question, “Who will care for my loved one when I am gone?” Call me to discuss your family member’s needs at (800) 704-PLAN or visit www.plannj.org for more information or to make a donation.

Thank you for joining me in celebrating **PLAN/NJ**’s 30 years of service to people living with disabilities and their families,

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.
Executive Director, PLAN/NJ

GET

A growing number of individuals are living with one or more disabilities. 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 solutions to a diversity of challenges: We offer life planning consultations; ways to optimize public benefits and private assets; and comprehensive care coordination options which deliver direct services and advocacy for hundreds of New Jersey residents and their families. **We currently serve 982 individuals and their families, and the need is great to serve many more.**

As just one example of the growing need, the Centers for Disease Control and Prevention (CDC) released a report in April 2018 showing the rate of children identified with an autism spectrum disorder has risen to 1 in 59 children nationally. New Jersey again has the highest rate of those states evaluated: 1 in 34 children — 3% of 8-year-old children — a sharp 19% increase from the previous statistic of 1 in 41 released only two years ago. This percentage is higher than the 1.7% average among the 11 states surveyed in 2014. The prevalence of autism spectrum disorders identified in New Jersey continues to exceed and outpace other states.¹

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 one or more of the following areas will help us to serve individuals and their families, now and in the future. You may choose to support our Promoting Independent Living/Pro Bono Services Program, which provides Guardianship, Home Visit Monitoring, Advocacy, Representative Payee for Social Security Benefits and Life Planning Consultation services for individuals who otherwise have no ability to pay the related service costs. You may wish to contribute to our General Operating Fund or to the Endowment Campaign to help us build organizational strength and stability. We have recently been named the recipient of funds in the form of a bequest, which may also be an option. And, on November 1, 2018, our *30th Anniversary: A Celebration of Abilities* event will kick off a donor challenge to achieve new levels of support before our fiscal year ends on June 30, 2019. **YOU** can help us meet and exceed our goals.

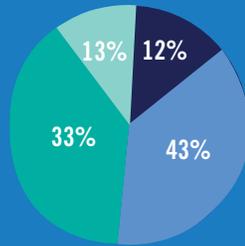
With **YOUR** support, we will be able to assist more families who need our compassionate, expert oversight and life-long care coordination for their loved one. Please help us spread the word about **PLAN/NJ**.

¹ <https://www.autismnj.org/prevalence-rates>

NEED! NOW! OVER! EVERY! DAY!

PLAN/NJ IN NUMBERS

Client Ages

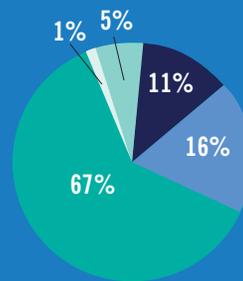


- 3-18 years
- 19-50 years
- 51-65 years
- 66-89 years

Celebrating **30 years**
of service to individuals with
disabilities and their families

Funding Sources

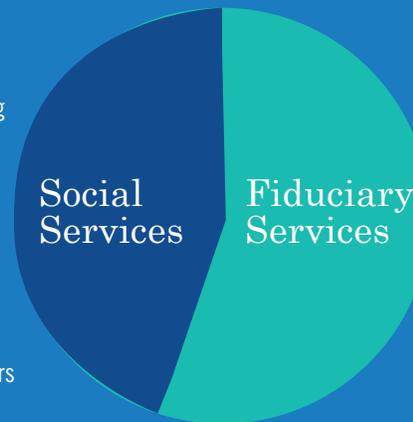
Fiscal Year 2018: \$1,424,726



- Grants and Private Contracts
- Service Fees
- Trust Fees
- Donations
- Other

Time & Services

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



- Special Needs Trust Administration
- Representative Payee

Reached **1,219** parents, siblings, potential clients, partners, human service and related agency staff with 20 educational seminars and exhibits

Drove **73,500** miles to visit clients — like driving three times around the world at the equator.

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WHEN I'M GONE?

(19)

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

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