



THE AMERICAN COLLEGE
CENTER FOR
SPECIAL NEEDS

Research and Advocacy for Those with Special Needs

TheAmericanCollege.edu/SpecialNeeds



THE
AMERICAN
COLLEGE
OF FINANCIAL SERVICES®

Caring, Compassion, and Community

A NOTE FROM THE EXECUTIVE DIRECTOR

Welcome to The American College Center for Special Needs! Formed by expert thought leaders in special needs financial planning, the Center for Special Needs is committed to elevating the expertise of financial professionals in the area of disability and special needs planning while also promoting strategies and solutions that aid individuals, families, and caregivers.



Joellen Meckley
Executive Director

26% of U.S. adults have some type of disability, and 7% of all children have a developmental disability.¹ Meanwhile, 58% of caregivers say they aren't sure where to turn for planning resources.² We aim to augment financial planning skills with specialized knowledge to help family members and caregivers plan for immediate and long-term care. Take the opportunity to shield clients by compassionately guiding families through complex financial decisions and benefits systems.

Contributions can make a real difference. The generosity of individual donors and corporate sponsors allows us to fund original research that informs the industry while also offering scholarships to The College's Chartered Special Needs Consultant® (ChSNC®) Program. Your continued support allows us to educate more financial professionals. We extend a special thank you to our sponsors and donors. Through caring and compassion, our community continues to grow in impact.

OUR MISSION

To become the nation's leading voice on the subject of holistic financial planning for professionals Who work with those living with disability, their families, and caregivers.

1 CDC.gov - Disability Impacts All of Us. September 16, 2020

2 Fidelity Investments® American Caregivers Study, 2021

Support for a Myriad of Complex Challenges

Disability and special needs planning require a comprehensive and inclusive approach. Clients with physical or mental deficits or significant disease conditions encounter highly unique challenges that require extensive planning. Not only do the particular needs of the individual need to be addressed, but each instance also potentially involves family members and caregivers.

These challenges might include:

- ✓ Finding the appropriate caregiver(s)
- ✓ Uncovering ways to gain the skills needed to earn an income
- ✓ Overcoming obstacles in the interviewing process
- ✓ Determining if they qualify for government benefits
- ✓ Acquiring specialized independent transportation
- ✓ Undertaking financial and estate planning

While the financial professionals who serve people with disabilities or special needs require in-depth knowledge in all planning areas, they also must understand the emotional complexity associated with various decisions, government benefits, estate planning techniques, and funding strategies for special needs trusts.

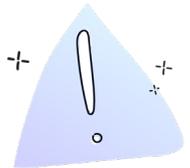
These financial professionals ultimately serve as a central nexus for their clients as they require access to a network of other professionals who can address countless specific and complex issues faced by those living with disability and their caregivers.

85%

of caregivers have had no plan to address physical, emotional, and financial responsibilities.¹

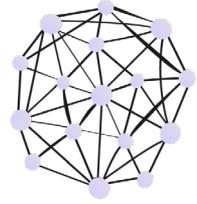
92%

of caregivers with special needs family members report feeling anxious about their financial future.¹



¹ Fidelity Investments® American Caregivers Study, 2021

A Network of Professionals and Research Partnerships



Build a Wide Network of Professionals

Our goal is to use research and education to provide financial professionals with a better framework for how to effectively identify and serve an individual's comprehensive needs.

In bringing together professionals and experts from multiple disciplines with expertise in the field of disability, we ensure a client's needs and issues are addressed in their entirety. This requires financial planners to connect with a wide network of professionals that might include:

- ✓ Attorneys
- ✓ Care advisors
- ✓ Special education experts
- ✓ Disability advocate
- ✓ Public benefits specialists
- ✓ Accountants and tax professionals
- ✓ Other professionals as needed

At the Center for Special Needs, our overarching mission is to improve the quality of financial services provided to those living with disability as well as their caregivers.

Sponsorship Opportunities in Research Partnerships

The Center for Special Needs collaborates with advocacy groups, non-profit organizations, and private companies that are doing innovative work in research, planning, and disability advocacy nationwide. This includes organizations that directly advise those facing the challenges of disability while working on a larger scale to support and uplift the disabled community.

Give Your Career a Higher Purpose

Only one financial services designation provides comprehensive disability education in special needs planning: The American College of Financial Services' Chartered Special Needs Consultant® (ChSNC®).

As the nation's only credentialed program specifically designed to develop plans for individuals with disabilities and special needs, their families, and their caregivers, The College provides financial services professionals with the education, knowledge, and tools necessary to understand the unique challenges these clients routinely encounter.

“ The knowledge I gained from this program has been invaluable. It provided me with the tools to help more individuals and families, meet and grow a network of professionals in the special needs space, and support other advisors at my firm in better serving their clients. I encourage anyone who is interested in or already working with those with special needs and their families to enroll in this program today!

MINDY NEIRA, CFP®, ChSNC®

Learn more about the ChSNC® at
TheAmericanCollege.edu/ChSNC



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A Legacy of Industry Leadership

Founded in 1927 by financial services education pioneer Dr. Solomon Huebner, The American College of Financial Services and its Centers of Excellence are dedicated to the pursuit of knowledge that aids the development of the industry and our communities. The College's mission is threefold: to provide applied financial knowledge and education; to promote life-long learning; and to advocate for ethical standards for the benefit of society.

VISIT TheAmericanCollege.edu/SpecialNeeds

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