



## **The Value of An Attorney's Network**

*Special needs attorneys have many kinds of legal expertise, but they also work with a range of other kinds of professionals to help them meet their clients' needs. This article explains the roles of these other professionals and how you can find an attorney with a good network of these contacts.*

### **An Attorney's Professional Network and How it Benefits Clients**

*When you're looking for guidance on planning and providing for a loved one with disabilities, choosing an attorney is a crucial step. Of course, you'll want someone with education and experience in the field. But selecting an attorney with a strong network of other professionals is also important.*

*Potential clients may or may not be aware that disability legal matters may require the expertise of some non-lawyers — financial advisors, nurse consultants, and social workers, to name a few.*

*We asked [Tom Begley, Jr., CELA](#), founder of [The Begley Law Group](#) in Moorestown, N.J., to explain who makes up an attorney's network and how to assure the attorney you choose can offer the kinds of contacts you may need. Tom is a founding member and past president Special Needs Alliance.*

### **What kinds of contacts have you developed in related areas of need?**

*"The first source is **other trust attorneys**. We receive referred cases from around the country, but we can only be licensed in two states. So, we make referrals to other members of SNA. These attorneys give tax advice, create trusts, and in personal injury cases, they work on options for settlement and how to allocate settlement money. They help with public benefits, wrongful death probate, guardianship, and estate planning for disabled people and their family members.*

***Financial advisors** are another source. They assist clients in managing money and developing wealth management strategies. They may also help in buying houses, cars, and the like.*

***Structured settlement brokers** are helpful in cases where clients or attorneys decide to buy a structured settlement (an annuity) and receive the money in payouts over time. The broker can explain the advantages and disadvantages of this approach. The settlement is free of taxes, and an attorney may therefore want to defer fees for tax reasons.*

**Nurse consultants** prepare a care plan for an injured person and monitor their needs over time. They can also provide services a disabled child may need and assist with parent needs, such as when a child is injured at birth.

**Professional trustees** may include staff at banks or nonprofit disability organizations. They know the law around trusts and closely follow any changes in it. These trustees can help avoid family friction over money, such as if a sibling who is a trustee does not want to approve money for the trust's beneficiary. Using a professional trustee can also avoid conflict of interest, which could arise if the trustee stands to inherit money from the trust after the beneficiary has died and therefore holds the trust funds tightly. There are two other advantages to using professional trustees. Professionals usually act more quickly than family members on these matters, and they are experienced in navigating the overall disability system.

**Medicare Set-Aside professionals** can come into play when a disability occurs in a personal injury case. The victim, if eligible for Medicare, may receive settlement proceeds from such a case which are put into a Medicare set-aside, account similar to a trust, which holds these funds to be used for future medical expenses. A Medicare set-aside professional calculates the needs and administers the payment.

Finally, a **social worker** can meet with the family and establish what's needed. This person may also work with the trustee and visit regularly to see if any changes are needed.

Never a week goes by when we don't involve one or more of these contacts. We have multiple people in our networks in each of these roles and we try to use the ones that fit best in each situation. For example, some trustees only work on particular trusts."

**What kinds of situations have come up that led you to tap into this network to benefit your clients?**

"The situations vary widely. But here's an example: If a parent of a disabled child becomes ill, a social worker or nurse consultant may check to see whether the parent is still capable of caring for the child and what new needs may be developing. That person then brings that information back to the team so that solutions may be found to assure adequate care.

In other situations, it may be appropriate for several of these professionals to meet behind the scenes and at no charge to the client, to share ideas and solve problems. For example, if a professional trustee falls short in the role, the team may meet to decide how to either work with the trustee to improve performance or drop that trustee and choose someone else."

## ***How can prospective clients find out if an attorney they are considering using has a strong network?***

*I'd recommend asking a few questions about their background to figure out if they are experienced enough to encounter citations where some of these other professionals are needed. For example:*

- *How many cases like this do you do each year?*
- *Does your expertise include any experiences of your own with a person with disabilities in your family?*
- *How can I prepare a plan for my family member with disabilities after I'm gone?*
- *Can you help me navigate the disability system? If so, how would you do so?*

*Finding an attorney with a valued network of other professionals can make a big difference. By understanding who makes up an attorney's network and how those people may assist you, you'll be a better consumer of legal services for your family or loved one.*

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