

Why Choose CPT

Experienced Trustee: We have served over 10,000 clients nationwide and currently operate in 48/50 states (excluding CT & NM) since 1994.

Competitive Flat-Rate Pricing: Designed to keep costs low to preserve client's funds and eliminate any conflicts of interest.

Flexible Funding Strategies: No minimum funding amounts are required and Structured Settlements are welcomed.

Partnerships with Industry Leaders: We work well with everyone including MSA Administrators, True Link Financial, National Care Advisors, TEAM Risk, etc.



**Benefits
Preserved**

Est 1994

Services

**All our trusts are designed
for instant set up if needed.**

1st & 3rd Party Pooled Special Need Trusts (PSNT): Designed to protect SSI and/or Medicaid eligibility, funds are typically from a settlement.

Settlement Management Trust (SMT): Designed when you need a low-cost Trustee to screen purchases for a person who is vulnerable of being taken advantage of or vulnerable of not spending funds in their best interest.

Minors Settlement Trust (CA Only): Designed to protect a minor that may be vulnerable to financial abuse or have the inability to spend funds in accordance with their best interest. The Trustee of a Minor's trust screens disbursements to ensure that they make fiduciary sense.

Spend Down Support: Designed for an individual receiving Supplemental Security Income (SSI) and/or Medicaid who needs to spend down excess money that he/she receives within a calendar month to maintain eligibility for public benefits.