SAVE THE DATE!
19th Annual Family Luncheon and Meeting

Friday, November 2, 2007 at the New York Marriott Marquis Times Square Hotel. This inspiring event is for member families, Personal Advocates, friends, and supporters to view at firsthand the work of Life Services. Plan to join us!
Call for further details.

- AN IMPORTANT CHANGE -
Medicaid Lookback May Not Apply When Funding A Trust For Your Child With A Disability

Parents struggle with the question of whether to fund a special needs trust for their loved one with a disability during their lifetime or to fund the trust through their wills and estate planning. Parents are often cautioned to keep their assets liquid in case they need care as they age. We often hear the term "Medicaid Planning", which for many raises many questions about the Medicaid "look back period" now five years and whether money can be transferred to a trust or not and when is a transfer acceptable. Don't assume that your state or county Medicaid provider will always have the answers. Nothing takes the place of a competent attorney in estate planning or disability law. Always consult a knowledgeable attorney in your state to determine the federal and state statues when making a decision that is right for you and your family.

In a recent court decision, In The Matter of Virginia Kaiser, the New York Supreme Court of Nassau County found that income transferred to a special needs trust solely for the benefit of a Medicaid recipient's adult disabled child is not countable when calculating the money available to pay for the recipient's cost of medical care.

Continued on page 4
MESSAGE FROM THE EXECUTIVE DIRECTOR

Lee Alan Ackerman

It has been a very busy year for the entire Life Services team. We continue to have significant new membership growth, demonstrating the value of the unique and vital services we provide. We have been able to keep pace in hiring new Personal Advocates, whose quality and long term commitment to our members are the keys to our success.

Hiring new advocates is always a delicate process, but through referrals, careful screening and interviewing, training and oversight, we have been able to develop a stellar team. To reflect the need to maintain close, personal supports while growing is the reason that we created the Personal Advocate Team Leader positions. (See article on page 7)

During the coming months, Life Services will be focused on:
- maintaining our high quality services to our membership.
- continuing to develop closer relationships and completing Planning Journals for our newest members.
- developing new and expanded services to be offered by Life Services, in response to requests for current members and potential members.

I look forward to seeing you at the Annual Luncheon (November 2nd).

MILLION DOLLAR ROUND TABLE FOUNDATION GRANTS
$10,000 TO LIFE SERVICES

On April 20th, 2007, Mitchell Wm. Ostrove, a representative from the Million Dollar Round Table Foundation, presented Life Services with a grant of $10,000. Accepting the grant is Leslie Park, Board Chairman, Lee Ackerman, Executive Director (left), and Rex Davidson, Vice President of the Board (right), on the occasion of the Life Services Personal Advocates Training Seminar in New York City.

CHRISTOPHER REEVE FOUNDATION GRANTS
$12,500 TO LIFE SERVICES

We want to thank the Christopher Reeve Foundation for the grant of $12,500 to further expand our education and community outreach services.

Earlier this year, Life Services received other support from:
- Ken-Lin Foundation.
- The Elena Melius Foundation.

Foundations and corporate support are an important part of the funding of Disabled and Alone Life Services for the Handicapped, Inc. Grants and special gifts make it possible to offer an affordable life care program to families with disabled members.
INTERNATIONAL VISITORS

Mr. and Mrs. Sathi Alur from Bombay, India were recent guests of Life Services, meeting with Leslie Park and Kenneth Preston, a former Board member and advisor.

Sathi and his wife developed one of the stellar programs for cerebral palsied children and adults in Bombay and have long been leaders in world rehabilitation affairs.

After a New York visit to our office some years ago, Sathi took our model of service back to his country and was instrumental in getting the parliament to pass legislation which now makes it possible for families of the disabled to set aside money for long term care of their disabled children without any taxation.

MORE THAN 80 STATES SIGN U.N. DISABILITY RIGHTS CONVENTION

Life Services joins Rehabilitation International in congratulating all governments who have taken the lead by becoming the first states to sign and ratify the U.N. Convention on the Rights of Persons with Disabilities, the first core human rights treaty of the 21st century. A record setting 81 signatories participated in the signing ceremony in New York recently. Jamaica became the first state to ratify the Convention.

In addition, 43 states signed the Optional Protocol to the Convention, which relates to how individuals and groups can seek redress for violations under the Convention once national remedies are exhausted.

LONG TIME SUPPORTERS PASS AWAY
By Leslie D. Park

Leonard Grebow, one of the champion supporters of Life Services passed away on May 18, 2007 at the age of 96. He lived in a single room occupancy hotel in New York City for most of his adult life. Born with a crippling condition in one of his legs, he used a cane to get around during a very active retirement.

For more than 15 years, I had the pleasure of meeting with Lenny and a small group of his friends, for breakfast every Tuesday morning. It was always lively conversation filled with laughter (he loved jokes) and interesting conversations on all subjects.

On September 11, 2001 we all remember leaving the breakfast meeting to see the World Trade Center buildings on fire.

Fiercely independent and refusing any charitable help for himself, Lenny nevertheless believed in helping others. His contributions to Life Services would arrive several times a year. Our records indicate that although living on a meager pension, he has one of the longest records of continuous support to the organization. He referred to it as "giving back!"

Bill Lyon, another member of this breakfast group preceded Lenny in death by a few months. Bill was also a supporter of Life Services in spite of living on a pension.

Both men epitomized the true meaning of charitable giving. I miss them both.

PERSONAL NOTES

John Wingate, long time board member of Life Services, was recently hospitalized in New York with a chronic illness. We wish him well.

Roz Brilliant, recently retired E.D. of Life Services has been traveling with her husband, Alan, to Australia, New Zealand, and the Fiji Islands. She's still full of energy and occasionally does consulting work for us.

Michael Sherlock, a long time Life Services member from Long Island, recently moved to a group home in Smithtown.

Dr. A. Georg Fleischer, Director of Rehabilitation Medicine of the Staten Island University Hospital, passed away on July 17, 2007. Although stricken with polio at an early age, he became a leading physician in rehabilitation medicine in the New York area.

Kathy Ibrahim, Office Manager at Life Services, and her husband are proud new parents of their first baby boy, Jadd, born June 9, 2007.

Iris Villatoro, Administrative Assistant at Life Services, completed her Bachelor's degree in Behavioral Science on May 30, 2007.

Linda Howard, a Personal Advocate at Life Services, has recently written an article on the hidden joy of working with people with disabilities. This has won her an award in poetry.
MEDICAID LOOKBACK MAY NOT APPLY...

Continued from page 1

A mother, who was applying for Medicaid to cover her nursing home costs, used her resources to fund her disabled daughter’s special needs trust (SNT). The county Department of Health (DCH) wanted to count the money placed in the SNT as assets for the mother in determining her eligibility. The case went through several fair hearings and eventually to the Supreme Court of Nassau County. The Supreme Court determined that… “The Social Security Law provides that in determining the Medicaid eligibility of an institutionalized individual, a local agency may not include an applicant’s asset (defined by both statute and regulation as “all income and resources”) transferred to “the individual’s child who is blind or disabled, or to a trust established solely for the benefit of such child or to a trust established solely for the benefit of an individual under sixty-five years of age who is disabled”

This decision is consistent with the federal law as well as regulations promulgated by the Department of Social Services, which contains similar exceptions. The importance of this decision is that families faced with serious illness may be able fund a special needs trust for their loved one with a disability without jeopardizing their own medical needs. If this is a concern for you, please immediately consult with a skilled elder law attorney.

THE GIVING-EXPRESS PROGRAM
From American Express

Life Services is now a member of The Giving-Express Program from American Express. For people wishing to donate to Life Services, simply go online to: americanexpress.com/give, in the box labeled “Giving is Easy”, select “Contribute Now,” and enter our name and you will be directed to information about Life Services. You will be provided with different giving options. American Express also permits donations of Membership Awards points and provides Membership Awards points for making the donation. The site also permits you to set up monthly giving to the charities of your choice.

Life Services also participates in online giving via a link on our website (www.disabledandalone.org). Through “Just Give.Org” we are able to accept donations from a wide variety of credit and debit cards!

Thank you for your ongoing support of our vital mission.

CREATING AN EFFECTIVE WILL

1. A Will is best drawn up by a lawyer who is familiar with you and the needs of your child with a disability.

   Suggestion: A Will is too important not to be done right.

2. The Will should specify how you would like your assets distributed to your heirs, or others. It should specify that assets, to be distributed to your heir with a disability, be given thru a Special Needs Trust, specially set up to benefit him or her.

   Suggestion: Make the Special Needs Trust the beneficiary, rather than the person with the disability.

3. Anyone named as a beneficiary in an insurance policy, bank account, etc., which you own, will have their benefits distributed to them, regardless of what your Will may say to the contrary.

   Suggestion: Discuss things with family members, or others involved to avoid litigation after you’re gone.

4. All family members, or others mentioned in your Will, should be familiar with what you intend to do in your Will and should be generally agreeable to the conditions.

   Suggestion: Discuss things with family members, or others involved to avoid litigation after you’re gone.

5. A Will may be changed, revised or updated in your lifetime. Only the most recent Will prevails when you die.

   Suggestion: Review your Will periodically as conditions change.

6. Since the conditions of your Will are carried out by an Executor, which you name, it’s a good idea to name a Successor Executor in the event of the death of the Executor.

   Suggestion: Your Will may be tied up in the courts if your Executor pre-deceases you, so choose wisely and identify back-ups.

Choosing an Executor may be your most important decision when making a Will.
The year 2006 might properly be called “a year of transition”; as we completed the first year in our new office quarters and ended our search for a new Executive Director. Lee Alan Ackerman of Michigan became our new Executive Director later in the year, after an extensive personnel search. He succeeds Roslyn Brilliant who retired after 13 years as Executive Director.

Public Education

In appearances before professional associations and groups of families caring for handicapped adults, the question is often asked, “Why don’t more people know about your organization?” Our answer to that is “Advertising costs money and we prefer that people get to know us through contact with the families we presently serve”. Nevertheless, our competent staff is scheduled to tell our story to groups throughout the year and inquiries come to us on a daily basis.

We continue to enjoy wide coverage in the New York area through public service announcements from WOR Radio station and occasional news articles. WOR Radio has continued to carry our message for several years now.

On August 28th, a special presentation was made by Life Services representatives to Rehabilitation International in recognition of their development of the wheelchair access symbol.

Representatives from over 100 countries attended this meeting at the German Embassy of the United Nations and learned about Life Services. We expect to present the work of our organization in 2008 at an international meeting in Montreal, Canada.

Board of Directors

Peter Van Nuys, a long time board member and valued legal advisor, retired from the board after thirteen years. New board members who will begin service (3 year terms) are Daniel Rice, Financial Consultant and Allen Rosen, CPA.

Fourteen outstanding voluntary leaders make up the Board of Directors. These are individuals willing to accept major responsibilities for the overall work of the agency. Many are parents of disabled children. The board meets at least four times a year, with committees carrying out the board’s work between meetings.

18th Annual Family Meeting and Luncheon

The luncheon was once again held at the New York Marriott Marquis Hotel on November 10th. Member families and guests made up the attendance of 135 people who were there to tell about and to hear stories of services to their individual families and to honor Rozlyn Brilliant, retiring Executive Director of Life Services.

Roz was honored after 13 years of outstanding leadership of the organization. Tributes to her were made by the Board of Directors, staff members, and most movingly, by families with disabled members.

Incoming, Executive Director, Lee Ackerman was introduced to the luncheon guests and the always welcome message from Commissioner Matthew Sapolin of the Mayor’s Office was received. Special “Service Awards” were presented to Personal Advocates who had been serving member families for as much as 10 years.

Robert Gutheil, board member, once again, served as Master of Ceremonies, with Invocation and Benediction offered by Richard Stimson, Southeast Regional Director. Musical entertainment was presented by our old friends, Karen and Charles Gourgey.

Training

The first line of staff service to our member families are the individual Personal Advocates located throughout the country. Each of these people are carefully selected to serve present and future needs, as outlined in an individual Planning Journal, which serves as a guide to planning for each disabled individual. In addition to individual training carried on throughout the year, a one day training session was held on April 7th in New York City.

Under the capable leadership of Tracy-Ann Adams, Director of Family Services and assisted by Roz Brilliant and Richard Stimson, this meeting was designed to provide a sharing of skills and experiences for the more than 50 Personal Advocates now working with families.

One can only say that these individual staff are a most inspiring group, representing the highest standards of competence and sensitivity to the needs of both individuals and families of people with disabilities.

Financing—Fundraising

Life Services does not solicit funds from governmental agencies, feeling that voluntary organizations need great freedom
and latitude in developing individualized services to assist families of people with disabilities. All of our support comes from voluntary dollars.

Funds to support our program were received from gifts left to us by friends and families of persons with disabilities, foundations, corporations, workplace campaigns, such as the Combined Federal Campaign among federal employees and the United Way campaigns among state and local agencies, and an annual mail solicitation. In addition, fees for service from member families helped to support the organization.

Summary

Improved use of our website is an immediate goal in the coming years, as well as improved fund raising and public relations. The quality of our service program to the growing number of member families continues at a very high degree of satisfaction, which is really the prime test of our effectiveness. Both staff and board are committed to this standard of excellence in the years to come.

Board of Directors — 2006

Jerome Belson
Henry Cortes
Rex Davidson, Vice President
Robert H. Gutheil
Wells Jones
Eugene Mauro
Naomi Miller, Secretary
Leslie D. Park, Chairman and Founder
James Searl
William Shannon, Treasurer
Joel Sherlock, M.D.
David Townsend
Peter Van Nuys, Vice President
John B. Wingate

Staff

Roslyn Brilliant, Executive Director
Tracy-Ann Adams, Director of Family Services
Richard Stimson, Southeast Regional Director
Kawthar Kotob-Ibrahim, Office Manager
Iris Villatoro, Administrative Assistant

Financial Report

Summary from 2006 Audit

Assets
Cash Equivalents 21,868.00
Investments 1,026,512.00
Investments held in Trusts 773,980.00
Furniture and Fixtures 40,493.00
Receivables 21,098.00
Pre-paid Expenses 21,727.00
Security Deposit 25,200.00
Total Assets $1,930,878.00

Liabilities
Accounts Payable & Accrued Expenses 18,820.00
Pooled Income Fund 16,056.00
Funds held in Trusts for others 773,980.00
Deferred Revenue 2,000.00
Total Liabilities 810,856.00

Net Assets
Unrestricted 1,079,529.00
Designated for furniture & fixtures 40,493.00
Total Net Assets 1,120,022.00

Total Liabilities & Net Assets $1,930,878.00

Activities

Support
Contributions 109,293.00
Donated Services (legal) 16,448.00
Gifts in Kind 1,500.00
Service Fees 42,666.00
Membership Fees 30,000.00
Income from Trust Funds 70,718.00
Investment Income 120,415.00
Change in Split Interest agreements (7,322.00)
Net assets released from restriction 12,522.00
Total Support & Revenue $396,240.00
Change In Net Assets (338,639.00)
Total Support $734,879.00

Expenses
Program of client services $634,972.00
Management & General $96,201.00
Fundraising $3,706.00
Total Expenses & Contributed Services $734,879.00

The auditor for Disabled and Alone/Life Services for the Handicapped, Inc. is: Lambrides, Lamos and Moulthrop, LLP
81 Larkfield Road, East Northport, NY 11731-1803
LIFE SERVICES MEMBERS ON THE MOVE
By Tracy-Ann Adams

Life Services is pleased to acknowledge the achievements of several of its members over the past few months. Congratulations to Michael Landau for completing his doctoral degree at the University of Georgia. Michael’s hard work and dedication and the support from his parents contributed to his success.

Cynthia Groopman was presented with the President’s Volunteer Service Award, by New York State Assembly Member, Michael Gianaris, for volunteering over 17,000 hours over the past 15 years. Cynthia states “Nineteen years ago I lost my sight in an accident. I wanted a sense of purpose to show others that people with disabilities could make a difference.”

Both Pedro Garcia and his mother Carmen Friedrahita Flores Rook have recently had books published; Pedro’s on the civil war battle of Port Hudson, “Port Hudson – Last Bastion on the Mississippi”, and Carmen’s, “Illuminaciones”, sponsored by the Ministry of Culture in her home country, Ecuador. Pedro is now working on his second book on civil war era submarines; in particular, one called the David. Carmen is working on a book of poetry.

PERSONAL ADVOCATE TEAM LEADERS
As Life Services continues to grow, we have created new positions: Personal Advocate Team Leaders. The Team Leaders will enable Life Services to provide the highly personal and quality supports that we are known for as our membership grows. We have implemented these positions in New York City and Long Island and will expand the program regionally when growth in membership occurs. The Team Leaders will provide support to the families, members, and oversee the Personal Advocates, helping to develop Planning Journals, annual goals, maintain close contact with families, monitor services and provide backup as needed. If you have any questions or would like more information, please contact Tracy-Ann Adams, Director of Family Services in our New York office.

PLANNING JOURNAL & RECORD SECURITY
Natural and manmade disasters continue to highlight the need to provide back-up copies of vital information to protect our members and to enable Life Services to continue to function in difficult times. To safeguard our members vital information, off site back-up of our computer files occurs daily. This protects all of our newer Planning Journals and, in the near future will protect the Planning Journals of our long time members as we transfer them into our computer system.

ANNUAL AHSCA FUNDRAISING KICK-OFF
September first is the kick-off date for this year’s annual federal and many state and local government employee’s charitable giving program. For over fifteen years, Life Services has benefited from this national campaign and continues to meet the high standards that a national non-profit must meet to participate in the state and city events. If you or someone you know is a federal employee who participates in this program, please encourage them to select Life Services as their charity. To select Life Services, the employee must use our new campaign number: 10547.

In other news, Mr. Thomas L. Youngblood, former Senior Vice President for the International Bible Society was selected to serve as the CEO of the consortium of charity organization participating in the Combined Federal Campaign among federal employees. He now represents Life Services and other non-profits in this vital effort.

ANNUAL MEMBERSHIP FEE
During the June Board of Directors meeting, a unanimously approved motion was passed to raise the Annual Membership fee, effective September 1, 2007, and annually thereafter. The annual increase will be based on the annual Social Security January cost of living increase. The Board felt that this action was the fairest way to cover increasing costs, rather than irregular increases in membership fees.

Effective September first the new Annual Membership rate is $4,100, a 2.5% increase over the current rate.
LIFE SERVICES MAY BE IN YOUR AREA

Future Care Planning Presentations and Exhibits

Iselin, New Jersey—Thursday, November 1, 2007 at the 2007 National Caregivers Conference.

Columbus, Ohio—Tuesday, October 30th, 2007 for OPRA.

New York, New York—Tuesday, November 6, 2007 at the Life's WORC and NYFAC conference of Autism Across the Life Span.


Ocala, Florida—October 17 - 19, 2007 at FASC (Florida Association of Support Coordinators).

If you wish to arrange a (no-fee, no-obligation) private meeting with our senior staff before or after the program, call the Life Services office at 800/995-0066 to schedule an appointment to discuss your special needs and concerns.