



The Fuller Co-Counsel Protocol

**A Step-by-Step Guide for
Estate and Trust Attorneys**
on Safely Offloading Complex
Special Needs Trust (SNT)
Work While Retaining Your
Client Relationship

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YOU DON'T HAVE TO CARRY THE RISK ALONE

To the Busy Estate and Trust Attorney:

You know that Special Needs Trusts (SNTs) are **a ticking time bomb of liability**. The moment you touch one, you're exposed to complex federal benefit laws that can change without warning. The risk-reward ratio is broken: high risk for a low-volume, specialized document.

We designed the Fuller Co-Counsel Protocol to fix that.

My name is **Michele Fuller**, and I focus exclusively on SNTs.

My entire practice is built on guaranteeing compliance for cases just like yours.

I am the guide who makes you look good.



The promise is simple:

- We handle the complexity and the risk
- You keep your client
- You earn up to **33%** of the fee

Let's solve your biggest SNT problem today!



SECTION 1

THE HIDDEN MALPRACTICE MAGNET

Why SNTs Are Your Highest Area of Practice Risk

Special Needs Trusts are not like other trusts. The failure of an SNT doesn't just lead to an unhappy client; it leads to the loss of a client's crucial government benefits (Medicaid, SSI), which can trigger a devastating malpractice claim.

This is the failure point of most general practices:

THE FUNDING MISTAKE

Improper funding, like directly depositing money from an inheritance or personal injury settlement into the wrong account, is the fastest way to disqualify a recipient.

THE JURISDICTION TRAP

SNTs require compliance with federal law and the state-specific rules of every single state where the client may reside or receive benefits. General counsel cannot keep up with all 50 jurisdictions.

THE ADMINISTRATIVE NIGHTMARE

Most attorneys deliver the document and walk away. The administrative checklist for the trustee is a continuous source of compliance errors that can blow up years later.



The solution is not to avoid the work, but to offload the risk to a national specialist!

A close-up photograph of a person's hands holding a black pen over a document. The person's left hand is holding the pen, and their right hand is pointing to a specific section of the document. The document has some text, including the words "ENTIRE AGREEMENT", "SEVERABILITY", "WARRANTY", and "WORK TRANSFER". The image is overlaid with a semi-transparent blue filter and two vertical yellow lines. The text "SECTION 2" is centered in the upper half of the image.

SECTION 2

THE FULLER CO-COUNSEL PROTOCOL

Client Retention Guaranteed: The Math of Zero Risk

Your biggest concern is losing a valuable client relationship. Our entire protocol is built around eliminating that fear, while simultaneously rewarding you for the referral.



PART 1: The Firewall Agreement

When you refer a client to Fuller Special Needs Law, we execute a legally binding Co-Counsel Agreement that puts a Firewall around your client relationship.

NON-COMPETE CLAUSE: Fuller Special Needs Law commits by contract to limit our scope to the SNT matter only. We will never attempt to cross-sell or handle your client's general estate planning, wills, general trusts, or other legal needs.

THE REPORT: You receive clear status updates and remain the primary point of contact for the client's overall legal portfolio. You are empowered to look good and maintain their trust.

PART 2: The 33% Fee Structure

The Math of Passive Income

Your Time Investment: 15 minutes (for the initial referral call)

Your Liability: Zero (transferred to the SNT specialist)

Client Relationship: Secured and strengthened

Your Revenue: Up to 33% of the SNT fee paid upon funding

Case Type	Fuller SNT Law Fee (Example)	Referral Income (33%)	Your ROI (Zero Work)
Typical 1st Party SNT	\$4,500	\$1,485	High
Typical 3rd Party SNT	\$5,500	\$1,815	High

You just earned **\$1,485 - \$1,815** for making *one phone call*.

Zero billable hours. Zero malpractice exposure



SECTION 3

THE FULLER SNT BLUEPRINT

Our 5-Step Process to National Compliance



Our compliance system is our **competitive advantage**. It is how we eliminate the risk you want to offload.

The Fuller SNT Blueprint is a proprietary, audited process used for every client, regardless of jurisdiction.

1 THE INTAKE MATRIX

Every case is run through our national compliance intake matrix, instantly flagging state-specific benefit nuances that could disqualify the client.

2 BENEFIT VERIFICATION

We contact the relevant agencies to verify the exact benefits being received before a single document is drafted, eliminating the guesswork that leads to funding errors.

3 AUDITED TEMPLATES

We use only our exclusive, court-tested trust templates, designed by SNT specialists and continuously updated for federal changes.

4 QUALITY ASSURANCE REVIEW

A multi-point internal audit is performed on the final document and the funding plan to ensure maximum benefit protection before it leaves our office.

5 TRUSTEE COMPLIANCE CHECKLIST

We provide the client's trustee with a clear, administrative checklist for ongoing compliance, protecting the client (and you) from future administrative errors.

The Result?

A **bulletproof** Special Needs Trust that protects your client's benefits, protects you from liability, and strengthens your client relationship, all while you earn passive income!



READY TO **OFFLOAD THE RISK** AND RETAIN THE **REVENUE?**



The decision to protect your firm and your client is the easiest one you'll make all year!

TAKE THE **NEXT STEP**

[**Email Michele to Get Started!**]

Email: Michele@FullerSpecialNeedsLaw.com

Subject: SNT Referral Partner Discovery Call

Provide your contact information and the best time to schedule a call.

A person's hands are shown holding a white pen with blue accents and a silver clipboard. The background is blurred, suggesting an office or meeting environment. A teal overlay covers the entire image, and two vertical yellow lines are positioned above and below the text.

SECTION 4

THE ACTIONABLE TOOL

THE SNT COMPLIANCE QUICK-CHECK

#	CHECKPOINT	YES/NO	RATIONALE (RISK FACTOR)
1	Primary SNT Type Identified	<input type="checkbox"/> YES <input type="checkbox"/> NO	Is this 1st Party (self-settled) or 3rd Party (by a No parent/guardian)? The laws are dramatically different.
2	Funding Source Defined	<input type="checkbox"/> YES <input type="checkbox"/> NO	Is the SNT being funded by a personal injury settlement, No inheritance, or by a parent's own assets? Requires distinct drafting language and reporting.
3	Non-Michigan Resident?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Is the client/beneficiary a resident of a state other than No Michigan? Requires national-level compliance expertise.
4	Government Benefit Verified	<input type="checkbox"/> YES <input type="checkbox"/> NO	Have you received written proof of the specific benefits No (SSI, Medicaid, etc.) the client is currently receiving? Drafting without this is high-risk.
5	Co-Counsel Value Confirmed	<input type="checkbox"/> YES <input type="checkbox"/> NO	Do you value retaining the client relationship more than handling this single, high-risk document? The Co-Counsel Protocol is the risk-free answer.



If you checked *NO* on #4 or *YES* on #3, REFER THE CASE IMMEDIATELY

READY TO **GET STARTED?**

Save this protocol

Share it with your **partners**.
And the next time a special
needs family walks into your
office, you'll be ready to say
"yes" and capture revenue
you would have otherwise
turned away!

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