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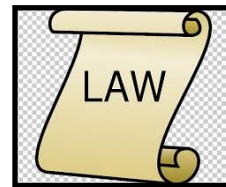
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NAMI-Santa Clara County



Helpline (408) 453-0400 Opt.1

Dec '23 / Jan '24



nami
National Alliance on Mental Illness

NEWS

A Special Needs Trust Gives Families Control

By Moryt Milo



For parents whose children have mental health conditions, the question of who cares for the children once the parents are gone is ever present.

Mark Gilfix, a partner at Gilfix & La Poll Associates and an expert in special needs planning, said this fear

can be abated with the right tools. Once established, these tools provide a powerful, life-long safety net for those children.

“There is so much we can’t control,” he said, “but let’s understand the financial and legal tools we have that anyone can put into place.”

These tools are there for any loved one with a mental illness diagnosis—a sister, brother, niece, nephew, or grandchild. The key is the diagnosis. Once someone is diagnosed with a severe mental illness that prevents a person from full-time gainful employment, the world around that family goes through a tectonic shift.

“Suddenly you have to think decades ahead and make sure your loved one is taken care of,” Gilfix said. This is when a Special

Needs Trust comes into the picture. “It is one of the most important documents you’ll ever sign to protect your child or loved one.”

This document, which is a third-party Special Needs Trust, is designed to hold assets for the benefit of a disabled person without disturbing public benefits such as Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), Medicare, or Medi-Cal.

For a Special Needs Trust to be effective, it must be irrevocable, which means it cannot be changed once there is money in it, and it must be managed by a third party.

The trust has two major purposes when the caregivers are gone. No matter how much money goes into this trust, whether it’s \$100,000 or millions, it will not affect the individual’s public benefits. Currently, if an individual has assets greater than \$2,000, a person loses their SSI or Medi-Cal benefits. The trust also manages those assets through a third party. Individuals with a severe mental illness often have difficulty with finances and daily management. The trust ensures funds are spent in a responsible manner.

A Special Needs Trust is a supplemental trust and is not something that is created in

a vacuum. It is part of a more comprehensive asset plan. The family needs three other documents: a Living Trust, Power of Attorney, and Advance Healthcare Directive. These documents make sure that if caregivers become unable to care for themselves, proper instructions are in place to take care of them and their loved ones in the Special Needs Trust.

Even though a Special Needs Trust is irrevocable, it is possible to make changes until it is funded. You can make changes such as who will be responsible for managing the day-to-day needs and financial aspects of this trust, since families are being asked to look years ahead and make difficult decisions. Will it be a sibling, another family member, close friend, or third party like a fiduciary or bank, Gilfix said.

“There is so much we can’t control,” he said. “Let’s take action and do what we can to protect our legacy and most importantly protect our next generation.”

To read the expanded story on Special Needs Trusts, [click here](#).

To watch the complete presentation on YouTube, [click here](#).



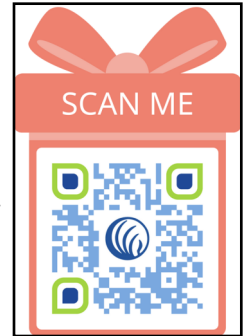
NAMI-Santa Clara County
Extends Wishes for a Very Happy and Safe Holiday Season!
The NAMI Office will be closed on these days:
Monday, Dec. 25, 2023 for Christmas
Monday, Jan. 1, 2024 for New Year’s Day

NAMI-SCC Board Officer Nominations for 2024-2025

In accordance with our bylaws, our annual election of officers will take place at the March 2024 General Meeting. We need candidates for: President, 4 Vice Presidents, Treasurer, and Secretary. If you are interested in joining our Board of Directors or wish to suggest someone, contact NAMI-SCC Board Vice President Beverly Lozoff at blozoff@namisantaclara.org. Nominations will be accepted from the floor at the February and March 2024 General Meetings.

Holiday Drive

This holiday season, NAMI-SCC will distribute gifts to patients in hospitals, mental health residential facilities, and homeless shelters, as well as participants at self-help and veterans centers. Each year, we distribute gift bags to over 700 individuals, which costs us over \$8,000. Please help us bring a smile to their faces. Often these individuals aren't able to spend the holidays with their loved ones nor do they receive gifts. If you would like to donate or sponsor the Holiday Drive, please send a check to NAMI-SCC, 1150 S Bascom Av, #24, San Jose, CA 95128. Or donate through our website, www.namisantaclara.org.



Volunteers Help with End-of-Year Letter

Thank you to NAMI-Santa Clara County volunteers for dropping by the office during November. Our volunteers helped file and send off our End-of-Year (EOY) letter. The EOY letter features a personal

story from a member of NAMI-SCC and summarizes NAMI-SCC's accomplishments over the past year. Volunteers placed the EOY letters into hundreds of envelopes and labeled envelopes for mailing. Afterwards, the NAMI-SCC staff and volunteers gathered for a pizza party. Thank you all for your hard work and dedication to mental health care! If you're interested in volunteering with NAMI-SCC, please contact our Helpline or go to our website, namisantaclara.org

A Tool to Ensure Safe Shared Housing for Mental Health Clients

By Lorraine Zeller

Last month, the Community Living Coalition had the pleasure of welcoming Janette Rosales, Catholic Charities of Santa Clara County Case Manager for Responsible Landlord Engagement Initiative (RLEI) to present information about their services. RLEI is a program operated by Catholic Charities of Santa Clara County (CCSCC) and primarily funded by the City of San José. Its goal is to resolve "problem properties disruptive to the neighborhood's safety, security, and well-being."

RLEI reaches out to property owners and landlords requesting that they voluntarily address the problems identified by neighbors or community members to mediate between the community and the problem property. Janette explained, "Issues impacting the neighborhood and the safety of mental health clients residing in shared independent living (IL) homes could be resolved by community members requesting RLEI's assistance rather than only by immediate neighbors." That means members of Community Living Coalition, NAMI, and others concerned with the health and safety of behavioral health clients residing in independent livings (also called "unlicensed board and care") can organize to open a case file.

Janette said, "Cases are opened with RLEI by a champion who presents a letter describing the problems and a petition signed by at least five affected neighbors or concerned community members. Once a case is opened, RLEI works with the landlord and the neighborhood or community group to resolve the issues. It is important to note that the home's residents don't have to be

involved in this group and any information about them will not be shared with the landlord."

On average, active cases normally conclude in approximately eight months, but factors may accelerate or delay the process. Successful resolution of the case requires active engagement by the neighbor or community group. If a case is not successfully resolved, RLEI provides coaching for the group to file in small claims court.

This program relies on engagement with public authorities and agencies including city council members; county elected officials and staff, police, fire and code enforcement officials; social service providers; and other associations supporting its efforts to keep neighborhoods and residents safe and healthy. RLEI's effectiveness in terms of Return on Investment (ROI) is documented in this report https://sanjose.granicus.com/MetaViewer.php?meta_id=700887 to San José's Neighborhood Services and Education Committee. For more on RLEI's success, see this video: **Responsible Landlord Engagement Initiative (RLEI) - Success Stories**. It includes testimony from San José City authorities and other officials.

Community Living Coalition sees collaboration with RLEI as a way to help ensure healthy and safe living for mental health clients residing in unlicensed independent livings. Let's consider how we can work together to identify unsafe living conditions and partner with RLEI to create healthy residents and neighborhoods.

Note: There will be no General Meeting in December. The next General Meeting will be on January 9, 2024. Past General Meeting presentations can be viewed by going to our website, www.namisantaclara.org, under News & Events and clicking "General Meetings."

NAMIWalks 2023 Wrap and Auction

By Llecenia Solorio

As we reflect on the resounding success of this year's NAMIWalks event, the spirit of unity and support lingers in the air. Participants from all walks of life came together at History Park in San Jose on October 7, 2023 contributing to a sense of togetherness and hope for the future of mental health. There were over 860 participants and \$268,918 has been raised so far. We hope you can once again help us reach our goal of \$280,000 by December 7, 2023 while participating in the NAMIWalks Auction with your generous donations and spirited bidding. The auction adds an extra layer of excitement to our cause. The funds raised will power NAMI-Santa Clara County's free, top-rated mental health programs, making a tangible impact on our community. We extend heartfelt gratitude to everyone who participated, donated, and supported, ensuring that the mission of mental health for all continues to thrive. Here's to the collective strength that propels us forward, hand in hand, toward a future of understanding, compassion, and support.

As the Walk season concludes, the season of giving begins. Why not start your shopping by giving back with NAMIWalks Silicon Valley? We are hosting an online silent auction until December 6 with curated items from the San Francisco Giants, Eyvind Earle, Rex Naden, and other local artists.

All proceeds will be donated to NAMIWalks Silicon Valley to get us closer to our \$280,000 fundraising goal! We are almost there and have until December 6 at 11:59 P.M. PST to reach our goal. Check out our auction and make a difference this holiday season with NAMIWalks Silicon Valley!

***Important: All items will be available for pickup at our office. For questions, please contact Llecenia Solorio at lsolorio@namisantaclara.org

You can bid on items by going to the website shown below, or consider making a donation [here!](#)

<https://nscc.betterworld.org/auctions/namiwalks-auction-2023>

Thank you for your continued support and HAPPY BIDDING!

Staff Spotlight: Lisette Muñiz



Lisette Muñiz was introduced to NAMI through her summer 2023 internship program, Health Career Connection (HCC). She worked with her supervisors at NAMI California for support and planning of Advocacy Day and Youth Summit 2023, as well as the creation of the Youth Leadership Council, including its programs and procedures. When this work was completed, she continued with mental health work by receiving her Mental Health First Aid certificate through HCC and NAMI California. She explored next opportunities at her nearby NAMI and is now working as the Community Peer Mentor Program Administrator at NAMI-SCC.

Lisette recently graduated from the University of California, Merced with a major in Public Health and double minor in Natural Sciences Education and Spanish. During her time at UC Merced, she worked at her school's health promotion office, often sharing with undergraduates mental health resources and topics regarding healthy friendships and coping strategies for stress and anxiety. Having gone through seasons of grief herself, she also learned what it meant to seek a grief support group on campus, and advocated that others do the same. She is grateful to be working at NAMI-SCC, and is thankful for all those who work at NAMI-SCC as well.

Mental Health Progress at the Federal Level

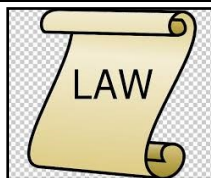
By Frank Alioto

For years, mental health advocates have fought for parity of care and treatment for mental health conditions equal to the care offered to those suffering from physical injuries and illnesses.

It has been a long fight, often frustrating, with mixed results. But perhaps things are beginning to turn...

The substance abuse scourge that has swept America combined with the mental stress of the COVID epidemic has changed some attitudes at the highest levels of our government and there is hope that mental illnesses will finally receive the attention and research they deserve. Much of the change in perspective is due to the personal experiences of our elected officials and their families. Many have publicly acknowledged their own challenges and faced the same problems as the general public. They have not been immune to the illnesses or misguided public reactions to their conditions or those of their loved ones.

Consequently, three years ago, the U.S. House of Representatives formed a bipartisan caucus to study mental health issues and



suggest legislative solutions. Today, over 100 members of the House of Representatives are members of this bipartisan mental health caucus. It has become a premier forum for discussing, proposing, and promoting mental health legislation from the House.

And early this year, the U.S. Senate (led by Senators Alex Padilla of California and Tom Tillis of North Carolina) followed suit and formed a bipartisan caucus to study mental illnesses and propose bipartisan studies and legislation.

Both Tillis and Padilla have been very open when discussing their own mental health challenges and the effects they have had on their work and families.

As a result of the caucus formations, numerous other members of the House and Senate have now come forward to discuss the challenges they and their families have faced due to mental health and stress.

The hope is that the caucuses will truly serve as a long-term, positive forum for progress in mental health care for all.

Note About NAMI-Santa Clara County Board Meetings: Our Board of Directors meets ten times per year (except August & December) on the 1st Tuesday of the month at 5:30 P.M. The Board Meetings are open to the public and we welcome your attendance. Currently, our meetings are virtual; check our website for log-in information.

13th Annual Behavioral Health Community Heroes Awards

The County of Santa Clara Behavioral Health Board is seeking nominations for the 13th Annual Behavioral Health Community Heroes Awards. These awards recognize local community members who have made an extraordinary difference in the lives of people with behavioral health challenges. Nominations will be accepted through January 12, 2024. The Behavioral Health Board will recognize a total of 11 heroes, one in each of the following categories: Agency, Consumers/Clients, Educator, Elected Official, Faith-Based, Family Member, Mover and Shaker, Young Mover and Shaker, Media, Program, Volunteer. Honorees will be recognized at the Annual Behavioral Health Community Heroes Awards on Wednesday, May 1, 2024, from 10:00 A.M. to 12 P.M. in person at 333 West Julian Street Auditorium in San Jose.

To submit a Heroes nomination, please click on the nomination form below:

[Nomination Form](#)



The 12th Annual Directing Change Film Contest has launched. Students and young adults are invited to create films to start conversations about mental health and advocate for change. Films are due by March 1, 2024. Read more about submission categories, including the new Hope and Justice category, and contest rules by going to www.directingchange.org

Donating Non-Cash Assets

Did you know that more charitable contributions involve non-cash assets like appreciated stock and real estate than cash donations? Consult your financial broker or learn more here:

[Non-cash asset overview](#) | [Schwab Charitable Donor-Advised Fund](#) | [Schwab Charitable](#)



**NAMIWalks Silicon Valley
2023**

NAMI-Santa Clara County Community Resource & Support Center

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San Jose, CA 95128

Ph: 408-453-0400 Fax: 408-453-2100

Website: www.namisantaclara.org

Email: office@namisantaclara.org

Office Hours: 10 A.M.-6 P.M. M-F

Walk-In Hours: 10 A.M.-2 P.M. M-F

To reach our Helpline, call
408-453-0400, option 1

After hours, press option 4

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