

***KATE DUSSAULT***

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***Personal Summary  
&  
Curriculum Vitae***

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Kate Dussault began her career working with individuals with disabilities 21 years ago when her brother suffered a severe traumatic brain injury. She has a BS degree in biological psychology from the University of Colorado, a paralegal certificate, and attended the College for Certified Financial Planning. She has seventeen years experience in settlement planning and private resource/public benefit coordination as a trustee, case manager, and collateral source benefit compliance consultant. She has spoken at several continuing education seminars for personal injury attorneys' including the National Brain Injury Association Conference for Attorneys and several State Trial Lawyers Conferences. She has presented at the National Life Care Planning Conference, the International Association of Rehabilitation Specialist and various programs for the Stetson University School of Law and Seattle University School of Law.

She has served on several boards during her career including: Colorado Citizens' for Accountability, Colorado Brain Injury Fund Raising and Legislative Committee, Jefferson County Department of Social Services Single Entry Point Advisory Board, Living from the Heart a non-profit agency providing recreational opportunities for individuals who experience disabilities. She acts as a consultant to attorneys, trustees and individuals who experience disabilities and their families regarding public benefit planning, Special Needs Trusts implementation and management, and a variety of other issues which affect persons with disabilities and their family members.

In May 2007 in an effort to resolve the various problems associated with obtaining safe and affordable accessible transportation she established Mobility Support Systems, LLC (MSS™). Additionally, as an effort to begin educating professionals and consumers on the safety issues related to accessible transportation she has begun speaking at several professional and consumer conferences including the International Association of Rehabilitation Professionals, Stetson University Special Needs Trust Conference, and various disability advocacy consumer groups. Her goals with MSS™ are to provide safe, affordable and easy Individual Transportation Services (ITS™) to individuals who experience disability. ITS™ includes full evaluation of safety and appropriate recommendations to accessible vehicles and products, accessible vehicles provided on a lease basis, 24/7 emergency road side assistance, full maintenance program and a unique national insurance program.

**KATE DUSSAULT**  
**Curriculum Vitae**  
**Mobility Support Systems, LLC.**  
**Settlement & Trust Consulting Services, Inc.**

**382 Ridge Road**  
**Tabernash, CO 80478**

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**Suite 200A**  
**Seattle WA, 98192**  
**(206) 709-8787**  
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**CURRENT PROFESSIONAL POSITIONS:**

Co-Founder and President of **Mobility Support Systems, LLC(MSS™)**. Direct and manage adaptive mobility company providing accessible Individual Transportation Services (ITS™) to individuals who experience disability. Duties include: corporate decision making, development of marketing materials/efforts, client relations, supervision of employees, etc.

Founder and President of **Settlement & Trust Consulting Services, Inc.** Provide consulting services in settlement planning of tort claims, financial plan designs, special needs trust implementation, trustee selection, collateral source (Medicaid/SSI) benefit review, trustee training programs, and compliance management. Specializing in the needs of disabled and elderly populations. Servicing clients in California, Colorado, Delaware, Florida, Illinois, Kansas, Minnesota, Michigan, Montana, Nebraska, New Mexico, North Carolina, Ohio, Oklahoma, South Dakota, Texas, Washington, and Wisconsin.

Settlement & Trust Consulting Services, Inc., Fraser, CO 80478 & Seattle WA 98102. 2000-Present

**INSTRUCTOR/LECTURER**

Consulting/Compliance Management Services for Special Needs Trust Implementation – Bank of Oklahoma, Cole Taylor Bank and Trust, Colorado State Bank, Founders Trust Company, Guaranty Bank and Trust Company, Wells Fargo Bank, Prudential Bank & Trust, The Capital Trust Company, US Bank, Golden Fiduciary Services, LLC, - California, Colorado, Delaware, Georgia, Kansas, Kentucky, Idaho, Illinois, Minnesota, Montana, Nebraska, North Carolina, Oklahoma, South Dakota, Texas, Utah, Washington, Wisconsin - 1997-Present

- Accessible Vehicle Selection and Evaluation-*Crawford Webinar-February 2009*
- Accessible Vehicle Safety and Disbursement Issues –*Stetson University Special Needs Trust Conference – October 2008*
- Accessible Vehicle Safety and Funding Options – *International Association of Rehabilitation Professionals –May 2008*
- Public Benefits Law 101 Seminar – *Seattle University-April 2007*
- Special Needs Trust Training Seminar – *Colorado State Bank/Bank of Oklahoma and Affiliates- November 2005*
- Case Management & Analysis of Structured Annuities – *Washington State Trial Lawyers Association-October 2005*
- Special Needs Trust Training Seminar – *US Bank- October 2004*
- Malpractice Alert-Ethical Considerations & Proper Settlement Techniques –*Medical & Legal Issues in Brain Injury Conference, North American Brain Injury Society (NABIS)-September 2004*
- Advanced Settlement Planning Practices –*Cooperative Association of Medical Malpractice Attorneys (CAMA)-September 2004*

- Representing Persons with Disabilities, Government Benefits & Maximizing Outcomes – *Utah Trial Lawyer’s Brain Injury Seminar- February 2004*
- Public Benefits & Settlement Planning for Children Who Experience Traumatic Brain Injury – *Ohio Brain Injury Association Attorney CLE Seminar—June 2003*
- Proper Settlement of TBI Cases – *Ohio Brain Injury Association Attorney CLE Seminar – June 2001*
- Advocacy, Public Benefits & Long Term Planning For TBI Survivors and Their Family – *Keynote: Colorado Brain Injury Association Conference – October 2000*
- Malpractice and Ethical Considerations in Handling TBI Cases – *National Brain Injury Conference for Attorneys – September, 2000*
- Collateral Source Benefits, Proper Settlement Planning of TBI Cases and Special Needs Trusts – *National Brain Injury Conference for Attorneys – September, 2000*
- Important Settlement Issues In Traumatic Brain Injury Cases – *Ohio Brain Injury Symposium– June 2000*
- Analysis and Practical Aspects of a Major Damage Case- Your Responsibilities – *Arizona Trial Lawyers Association Continuing Education Seminar – April 2000*
- Analysis and Practical Aspects of a Major Damage Case- Your Responsibilities – *Colorado Trial Lawyers Association Continuing Education Seminar – November 1999*
- Trust and the Multidisciplinary Approach- What Every Life Care Plan Consultant Needs To Know *National Life Care Planners Conference – Intelicus – November 1999*
- Proper Implementation and Management of Special Needs Trusts – *Training Seminar – Wells Fargo Bank-Colorado, Arizona, Utah Region – October 1999*
- Understanding: Public Benefits, The Litigation Process and Long Term Planning Issues for Traumatic Brain Injury Survivors. – *Colorado Brain Injury Conference – October 1999*
- Proper Settlement of TBI cases: Public Benefits and the Special Needs Trust – *National Brain Injury Association Conference for Attorneys – September 1999*
- Proper Implementation and Management of Special Needs Trusts – *Training Seminar – Wells Fargo Bank, Texas, New Mexico Region – August, 1999*
- Settlement Allocation Issues and the Use of Special Needs Trusts – *Ohio Brain Injury Association Conference – June 1999.*
- Utilization and Implementation of Special Needs Trusts - *Utah Brain Injury Association Conference – January 1999.*
- Use and Implementation of Life Care Plans in Coordination with Special Needs Trusts – *Intelicus-University of Florida Case Manager/Life Care Planning Advanced Training – January 1999.*
- Malpractice Alert: Ethical Considerations in Handling TBI Cases – *National Brain Injury Association Conference for Attorneys – September 1998; Colorado Brain Injury Conference October 1998*
- Collateral Source Benefits & Implementation of Special Needs Trusts– *National Brain Injury Association Conference for Attorneys – September, 1998; Colorado Brain Injury Conference October, 1998*
- Ethical Considerations in Representing the Personal Injury Client - *Practical Case & Liability*
- Management - *Continuing Education Seminars for Attorneys – October, November & December 1998. Colorado and Washington State Seminars.*
- Utilization and Implementation of Special Needs Trusts - *Utah Brain Injury Association Conference – February, 1998*
- Ethical Considerations in Representing the Personal Injury Client - *Practical Case & Liability Management Continuing Education Seminars for Attorneys – July & August, 1997 –Colorado Seminars*
- Implementation of Special Needs Trusts - *National Life Care Planners Conference –November, 1997*

## **PUBLICATIONS/PROFESSIONAL AFFILIATIONS**

- “Special Needs Trusts-Misunderstood, Underutilized”-Financial Advisor, January 2001-contributing informer
- “Special Needs Trusts: Powerful Planning Tools For Disabled Individuals”-Journal of Financial Planning, January, 2002
- Board Member: Colorado Citizens for Accountability, Centennial CO 2005-2007

- **Affiliated Member:** Review and monitor asset management and investments for Special Need Trusts. Seal Financial Services, Inc., Denver, CO 1999-2003
- **Planning Committee Member:** National Brain Injury Conference for Attorneys - 2001
- **Board Member:** Colorado Brain Injury Legislative Committee 1999-2001
- **Consultant:** Review and provide recommendations to non-profit therapeutic intervention and recreation program for persons with disabilities. Living From the Heart, Morrison, CO 1996-2000
- **Advisory Board Member:** Provide advice to agency providing home health and other services to the disabled and elderly communities. Home Care Management, Inc., Denver, CO 1997-2000
- **Advisory Board Member:** Provide advice to Single Entry Point program regarding long-term care issues for the disabled and elderly. Jefferson County Department of Human Services Single Entry Point, Golden, CO. 1996-1998
- **Planning Member:** Get Moving Colorado Steering Committee: Colorado Brain Injury Association, Denver, CO -1998

### **EDUCATION:**

Bachelor of Science: Biological Psychology - University of Colorado, Boulder, CO -1990.

**HONORS THESIS:** Executed study on memory loss in mild to severe brain injured patients including: testing, data gathering, evaluations, analysis of statistical /theoretical data, and provided written report to staff neuro-psychologists. Craig Hospital, Englewood, CO -1990

Certified Paralegal: Denver Paralegal Institute, Denver, CO - 1992.

College for Financial Planning, Denver, CO - 1995-1997.

NASD Securities Licenses: Series 6, Series 7, Series 24, Registered Investment Advisor 1996-2005-Colorado only (**not currently licensed**)

### **PAST PROFESSIONAL ACTIVITIES:**

- **President /CEO:** and founder of Trust Management Service Company (a Colorado Corporation) and Special Needs Fiduciary Services (a Washington Corporation). Provide all management and services for trust company providing full conservator and trustee functions for individuals with disabilities with a specialty in the management of Special Needs Trust. Servicing clients in California, Colorado, Delaware, Illinois, Kansas, Minnesota, Montana, Nebraska, New Mexico, New Zealand, North Carolina, Ohio, Oklahoma, South Dakota, Texas, Washington, and Wisconsin.  
Trust Management Services, Co., Littleton, CO 80160. 1996-2001  
Special Needs Fiduciary Services, Inc., Seattle, WA 98102. 2000-2001
- **Trustee/Case Manager:** Provided variety of services including: review and analysis of investment accounts, accounting, coordination of outside professionals, assessment and consultations of beneficiary's needs/expenses, Medicaid/SSI and Medicare/SSDI benefit review and compliance management, referrals to community resources, client advocacy, etc. Sole Proprietor and Consultant. 1991-1996
- **Paralegal:** Provided legal research, client relations, document preparation, file organization, trial preparation, court intervention, trust management activities, client advocacy, benefit service coordination. Breit, Bosch, Richmand, & Levin, P.S., Law Offices of Kelly McCurley, P.S., Denver, CO 1992-1995
- **Correctional Officer:** Provided intake assessments, court recommendations, counseling, organization of daily activities, family supervision, assessment of juvenile and family needs/resources and referred to community resources. Boulder County Juvenile Center, Boulder, CO 1990-1991.
- **Counselor:** Provided intake assessment and counseling for neglected/abused juveniles in out of home placement facility. Attention Homes, Inc., Boulder CO 1988-1991
- **Recreational Therapy Aid/Counselor:** Implemented and organized daily activities for severely brain-injured patients, counseled patients and family members. Heritage Rehabilitation Center, Denver, CO 1987-1988