



ANNUAL REPORT

2025

"Building Community Through Best Practices"

Alliance of Pooled Trusts (APT) is the first coalition in the United States dedicated to uniting Pooled Trust providers in establishing best practices for the industry. APT serves as a resource for its members and promotes high-quality pooled trust administration for the special needs community.

LEADERSHIP

Message from the APT Board of Directors

APT has long been grounded in the belief that our collective impact is stronger than any individual effort. The foremost priority of the APT Board is to continue and strengthen the shared goals of our industry: advancing thoughtful advocacy, fostering ongoing education, and promoting open collaboration across organizations. These principles have defined APT's success and will remain at the heart of our work moving forward.

We share a fundamental belief: that by learning together and supporting one another, we become a stronger industry and a more effective community. When we invest in education, transparency, and collaboration, we not only enhance our own organizations, but we also help elevate the quality, consistency, and integrity of pooled trust services nationwide. This collective growth enables us to better fulfill our shared mission: providing responsive, ethical, and compassionate service to persons with disabilities.

OUR MISSION

To inform, educate and facilitate communication among Pooled Special Needs Trust providers by establishing and maintaining best practices for the benefit of the communities they serve.

During 2026, the APT Board looks forward to building on the strong foundation established by APT's past leaders whose contributions I would be negligent to not acknowledge. Professor Rebecca Morgan and Professor Roberta Flowers through their work with the Life Passage Planning project, numerous past Board members and industry leaders, and of course, Steve Dale, who championed and organized the establishment of APT.

Together, we will continue to expand opportunities for professional development, encourage meaningful dialogue among members, and strengthen our unified voice in policy and advocacy efforts. Most importantly, we will remain focused on the people at the center of our work — the individuals and families who rely on Pooled Trusts to support their independence, dignity, and quality of life.

Thank you for your continued dedication to this field and for the collaborative spirit that makes APT such a valuable and impactful organization. We look forward to learning from each of you and to working together as we continue to advance our shared mission.

Kevin Hayde

PRESIDENT, ALLIANCE OF POOLED TRUSTS

INDUSTRY LANDSCAPE

APT Supports The Growing Pooled Trust Industry

National Standards

The pooled trust industry is undergoing a significant transformation, evolving from a landscape of fragmented nonprofits into increasingly sophisticated, professionally managed operations. This evolution reflects growing recognition of the critical role pooled trusts play in supporting individuals with disabilities and their families.

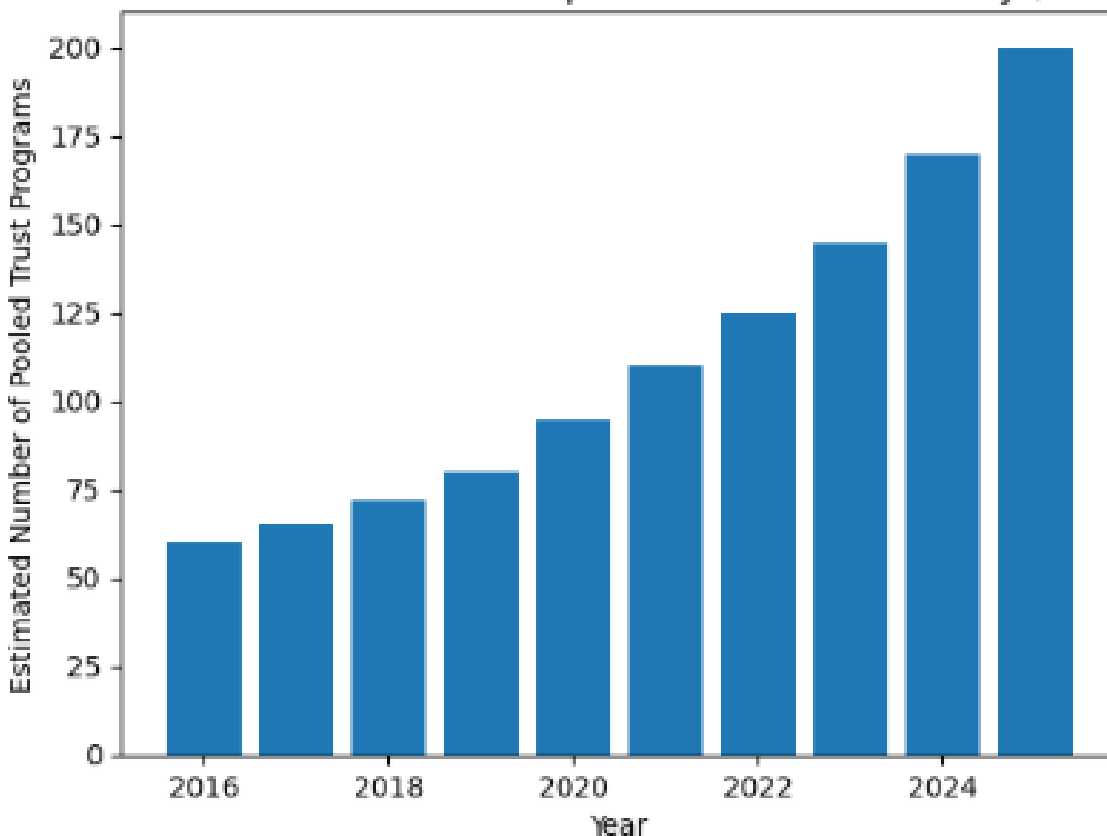
Industry Evolution

- Centralized administration and compliance systems
- Investment pooling for diversification and efficiency
- Specialized expertise in benefit eligibility and distribution compliance

APT Support: National Standard Promotion

- Greater trust and credibility
- Improved scalability across organizations
- Stronger governance expectations

Illustrative Growth of the Pooled Special Needs Trust Industry (2016-2025)



YEAR IN REVIEW

2025 Highlights

The past year has been one of significant growth and achievement for the Alliance of Pooled Trusts. We have expanded our reach, enhanced our educational offerings, and taken concrete steps to establish national standards for our industry.

7%

National Membership Growth

12

Educational Sessions Organized

3

New Board Members Added

M Membership Growth

APT grew its national membership by 7%, reflecting increasing recognition of the value APT brings to pooled trust organizations across the country.

A Annual Membership Meeting

The APT presented its strategic direction to APT members during a special session at the 2025 Stetson Special Needs Conference.

B Board Representation

The APT Board added 3 new Board members representing pooled trusts in Minnesota, Ohio, and Wisconsin, broadening geographic and organizational diversity.

E Educational Presentations

APT organized 12 educational sessions on subjects ranging from 'Changes to Social Security' to 'Communications in Turbulent Times', providing valuable professional development opportunities.

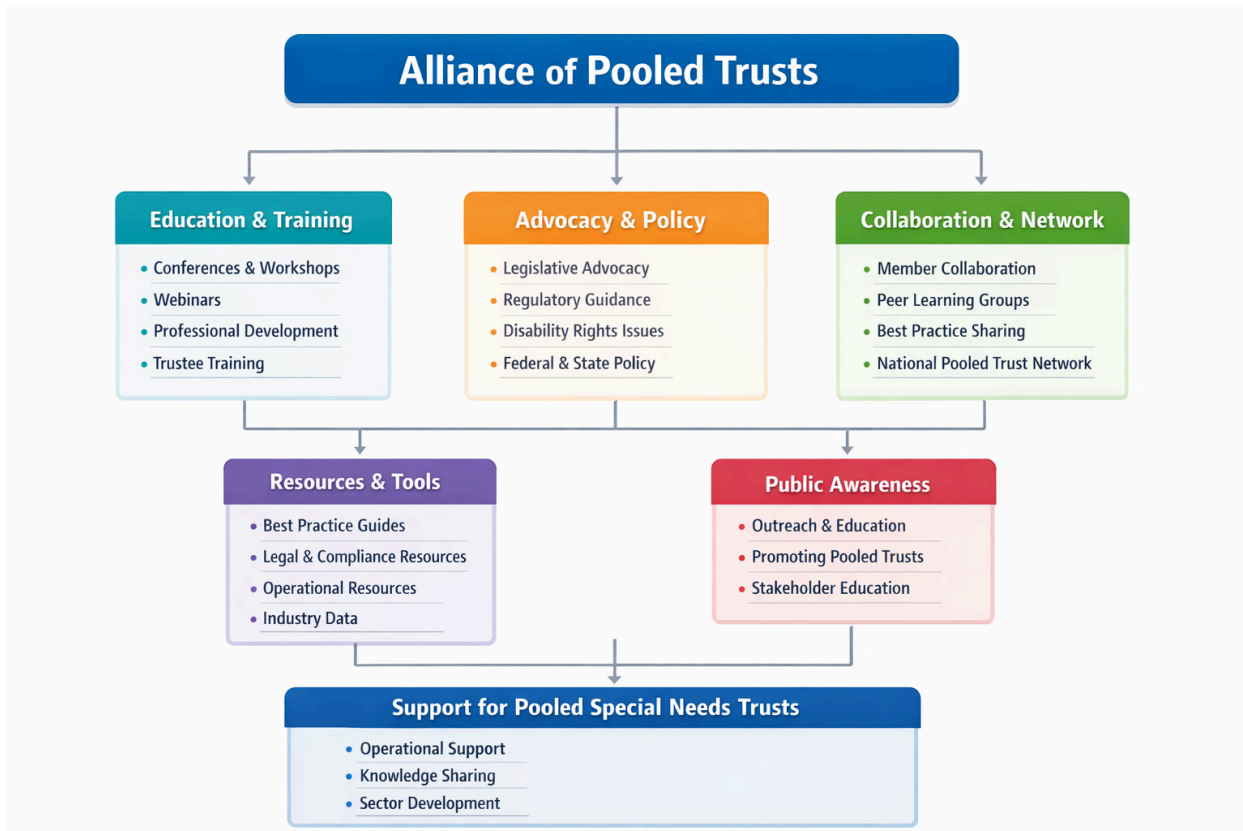
N National Standards Supplement

APT created and finalized the National Standards Supplement to ensure industry guidance for best practices for pooled trusts, a landmark achievement for the sector.

MEMBER VALUE

Organizational Structure

APT operates through five interconnected pillars that together deliver comprehensive value to its members and the broader pooled trust community nationwide.



COMMUNITY

Building Community Together

Our strength lies in our members and the connections we build. Throughout 2025, we came together at the Stetson Special Needs Conference and other events to share knowledge, celebrate achievements, and strengthen the pooled trust community nationwide.



"Together, we will continue to expand opportunities for professional development, encourage meaningful dialogue among members, and strengthen our unified voice in policy and advocacy efforts."