



Special Needs Planning: Checklist

Have you ensured your child will be cared for when you are no longer able to do so? Here are some questions to consider:

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have you selected a guardian to care for your child when you are no longer able to do so, and have you executed the necessary legal documents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you written a letter of intent to express your wishes for how your children should be taken care of in the future? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you familiar with the government benefits available for your child, and do you adequately understand the standards that must be met for your child to qualify for those benefits? |
| <input type="checkbox"/> | <input type="checkbox"/> | If friends or family have included your child in their wills, have you ensured that it will be done in a way so that your child does not lose any available government benefits? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a will that was drafted with special consideration and provisions concerning your special needs child? |
| <input type="checkbox"/> | <input type="checkbox"/> | If something happens to you today, are there adequate funds to care for your special needs child for the rest of his or her life? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you set aside specific funding or life insurance for your child, and is that funding properly characterized so as not to disqualify your child from government benefits? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your estate or other advisors specialize in planning for families with special needs children? |
| <input type="checkbox"/> | <input type="checkbox"/> | Has an attorney created a special needs trust to protect your child's present and future interests, and have you completed a thorough financial review to determine adequate funding for a special needs trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you certain that you have ensured your special needs child will have the quality of life that you want for them? |