

CHECKLIST FOR YOU AND YOUR SPECIAL NEEDS INDIVIDUAL

- Do you or your spouse have a vision of how your child will live if both of you are not around?
- Do you have a Special Needs or Supplementary Trust set up to preserve government benefits?
- Have you identified a Guardian, Conservator, or Trustee for your child?
- Have provisions been made to fund these trusts with assets or insurance?
- Do you have a complete understanding of Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) government benefits?
- Have you coordinated your special needs planning with other relatives?
- Have you begun setting aside money for your child with special needs?
- Have you done everything possible to protect your child's financial future?
- Do you have a written Letter of Intent?
- Have you planned where your special needs child will live if you are not around?
- Are either children with Special Needs or children without special needs being excluded in your will?
- Will your child be able to earn enough to care for himself or herself?
- Will your child have adequate health insurance?

We encourage you to review this list with your special needs advisor.



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