The ABC's of Special Needs Planning

Presenter: Bart Stevens

Intended Audience: Family members, care givers, guardians, trustees and anyone providing support services to persons with special needs.

Session Description

The objective of this presentation is to address, the common estate and future planning issues facing families who have a loved one with special needs.

This presentation addresses the common estate and future planning issues facing families. Our purpose is to educate families about the planning process and to empower them to take the necessary action to develop a plan that provides security and quality of life for the person with special needs, today and in the future.

We will discuss how to begin and complete the planning process addressing *Lifestyle, Legal, Financial Needs,* and *Government Benefit* issues. Ultimately, attendees will leave the session empowered to prepare a plan with the necessary documents to assure a smooth transition, security, and quality of life while giving all peace of mind.

- <u>Lifestyle Planning</u>: Provides detailed information about the *abilities* of the person. Where assistance is needed, the type and how to provide it. This information is recorded in a document called the "Letter of Intent."

- <u>Legal Planning:</u> Discussion on Wills, Special Needs Trusts, Guardianship and Structured Settlements

- <u>Financial Needs Assessment:</u> Addresses current and future budgetary planning and options for providing funds to support the persons budget.

- <u>Government Benefits:</u> Includes Social Security (SSI, SSA, SSDI), Medicaid and Medicare.