



A SPECIAL NEEDS PLAN CHECKLIST

DO YOU HAVE...

YES NO

Your own goals clearly defined?

Your assets positioned effectively for your retirement, financial independence of your special needs loved one, and for the rest of your family?

A clear understanding of government benefits, and a plan in place to maximize these government benefits?

A will put together?

A special needs trust and a separate trust for your other heirs?

A trustee chosen?

Guardianship defined for today and for when you are no longer able?

A L.I.F.E.™ Journal covering the 3 major areas:
Medical History — Day to Day Practical Advice —
And Your Hopes and Dreams for Your Loved One?

A Job Coach to assist with employment opportunities?

A system in place to maximize your tax deductions?

Your plan communicated?

Additionally, have you educated family, like grandparents, on the proper way to gift, therefore not forfeiting government benefits?

Peace of Mind with your current plan?