A Special Needs Plan™

The 6 Clarity Conversations™

1. **The Big Vision Conversation™**
   a. What do we want for our Special Needs Loved One, short and long-term?
   b. What do we want for ourselves, short and long-term?
   c. What are we most concerned about?
   d. What advantages do we have?

2. **The Care-Giving Conversation™**
   a. Who will care for our Loved One when we cannot?
   b. Where will my Loved One live?
   c. What will their lifetime of care cost?
   d. How do we pay for the care?

3. **The Money Conversation™**
   a. Do we have enough money for our lifetime & the lifetime of our Loved One?
   b. How can we ensure we have enough money today and tomorrow?
   c. How do we protect that money so it is used effectively?
   d. How can we be fair to our other children?

4. **The Government Benefit Conversation™**
   a. Which ones do we qualify for?
   b. How do we qualify?
   c. When do we qualify?
   d. Once we begin receiving, How do we ensure we never lose them?

5. **The Communication Conversation™**
   a. Have we communicated current and future care wishes with our Family & Friends?
   b. Do future caregivers know all important people in your loved one's life?
   c. Do future caregivers know your loved one's daily activities?
   d. Does extended family understand how to gift money, properly?

6. **The Coordination Conversation™**
   a. How do we link financial, legal, government benefits, healthcare, tax and communication strategies into one cohesive plan?
   b. What is the impact on your plan, your family, and your Loved One if tax rates rise, markets decline, government benefits change or you both live longer than you expect?

CALL US AT **(800) SN9-8610**

VISIT US AT **WWW.ASPECIALNEEDSPLAN.COM**