
Comprehensive Special Needs Planning Checklist

✓ **Part 1: The Life Plan**

The Letter of Intent

❖ Significant Relationships

- Family
- Other Relatives
- Friends
- Guardians

❖ Living Environment

- Housing
- Geography
- Special amenities, furnishings, modifications, and/or assistive technologies
- Human support/Care giving
- Independent living goals

❖ Education and Career

- Individualized Education Program (IEP)
- Educational achievements and goals
- Volunteer experiences
- Job/Life Coach
- Career achievements and goals
- Professional experiences/trainings

❖ Special Needs

- Therapies and therapists
- Medical needs and medical professionals
- Government Benefits and Case Manager
 - Waiver
 - Social Security Income (SSI)

- Social Security Disability Income (SSDI)
- Medicaid
- Medicare
- Financial/Legal Services
 - Guardian
 - Trustee
 - Financial Manager
 - Power of Attorney
- Family Narrative

✓ Part 2: The Resource Plan

- Developmental services and resources
 - Speech therapy
 - Physical therapy
 - Occupational therapy
- Home and/or Living resources
- Social Security and Medicare resources
- Social Security Income and Medicaid resources
- State disability services and resources
- Community support organizations and resources
- Educational resources
 - Individualized Education Program (IEP)
 - Tutoring services
- Employment resources
 - Job coach
 - Life coach
 - Job training
 - Professional development

✓ Part 3: The Financial Plan

❖ Family Financial Plan

- Budget
- Emergency/Reserve fund
- Debt management
- Asset and Liability Projections
- Cash flow analysis
- Investment planning
- Retirement planning
- Life insurance needs
- Disability insurance needs
- Long-term care insurance needs
- Estate planning
 - Charitable planning
- Tax strategies
- Higher education planning

❖ Special Needs Financial Plan

- Estimation of child's lifetime financial need
- Strategies to work with government benefits
- Strategies to fund the Special Needs Trust
- Strategies to manage the Special Needs Trust
- Strategies for income distribution from the Special Needs Trust
- Alignment of beneficiaries with Legal Plan

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✓ Part 4: The Legal Plan

- Will
- Power of Attorney
- Medical directives
- Family Trust
- Special Needs Trust
 - Choice of Trustee
 - Trust Protector
 - Third party v. first party trust
 - Stand alone v. inter vivos trust v. testamentary trust
- Guardianship

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