

## Special Needs Planning Worksheet

### “Planning For The Future of My Child” “Who Will Take Care Of Your Special Needs Child When You Cannot?”

1. In what ways do you currently provide support for your child/dependent with special needs?
  - Housing
  - Food
  - Clothing
  - Medical care
  - Rehabilitation
  - Vocational assistance
  - Emotional support
  - Financial support
  - Supervision
  - Other\_\_\_\_\_
  
2. What is your current vision of how you will supplement support for your child/dependent with special needs when they become an adult?
  - Housing
  - Food
  - Clothing
  - Medical care
  - Rehabilitation
  - Vocational assistance
  - Emotional support
  - Spending money
  - Supervision
  - Other\_\_\_\_\_

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3. What is **your current vision** of how you *wish* to provide for your child at your death or disability?

- Housing
- Food
- Clothing
- Medical care
- Rehabilitation
- Vocational assistance
- Emotional support
- Spending money
- Supervision
- Other \_\_\_\_\_

4. What factors might influence changes in your vision for your child in the future?

- Health condition of your child –chronic or progressive?
- Future medical treatments that improve his/her health?
- Vocational training that improve child's earning power?
- Child gets married?
- Your personal financial situation?
- Your child's *eligibility* for government benefits
- Your child's **ineligibility** for government benefits
- Other \_\_\_\_\_

5. Up to now, what provisions have you made if your child outlives you?

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6. Have you described, in writing, your child's care for subsequent caregivers? \_\_\_\_\_

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7. What are your child with special needs current estimated monthly expenses?\_\_\_\_\_ Will expenses change in the future?\_\_ How?\_\_\_\_\_ When?\_\_\_\_\_
8. List your  
current assets?\_\_\_\_\_
- current liabilities?\_\_\_\_\_
- Net Worth?\_\_\_\_\_
9. Have you determined the amount of money you need to set aside for your child's future?\_\_\_\_\_ If so, how did you determine this?\_\_\_\_\_
10. Do you have sufficient Net Worth (as computed in #5) to take care of your child with special needs in the future?\_\_\_\_\_
11. If not, what benefits will you depend on or what techniques will you use to create sufficient funds for your child's secure future?
  - Savings and investments
  - Social Security Disability Income (SSDI)
  - Supplemental Social Insurance (SSI)
  - 401K
  - IRA
  - Your home
  - Other real estate
  - Insurance
  - Friends and family contribute gifts to a fund for your child
  - Family inheritances
  - Other\_\_\_\_\_

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12. Will you leave an inheritance to your other children?\_\_\_\_\_ If so, what methods will you use in order to leave an inheritance to others and still provide for your special needs child?\_\_\_\_\_

\_\_\_\_\_

13. How have you protected your income and assets in the event of your prolonged disability?\_\_\_\_\_ Have you protected your income and assets in case of your premature death?\_\_\_\_\_

\_\_\_\_\_

14. In what ways will planning for your child affect your retirement planning?\_\_\_\_\_

\_\_\_\_\_

15. What documents (legal/binding and others) have you established that transform your clear vision into a definite, written, well thought out plan:

- Will
- Living Trust
- Special Needs Trust
- Supplemental Needs Trust
- Discretionary Spend Thrift Trust
- Power of Attorney
- Durable Medical Power of Attorney
- Living Will
- Medical Directives
- Letter of Intent
- Other

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16. Is it likely that your child will be eligible for government benefits in adulthood? \_\_\_\_\_  
\_\_\_\_\_

17. How do you plan on passing an inheritance to your child in your current estate plan? \_\_\_\_\_  
Do you want to modify your plan? \_\_\_\_\_  
In what way? \_\_\_\_\_

18. Will you consider a Special Needs Trust as a useful tool in your plan?  
\_\_\_\_\_

19. If so, who will serve as trustee(s)?  
\_\_\_\_\_  
\_\_\_\_\_

20. Will a Guardian be needed? \_\_\_\_\_ Who could serve as Guardian? \_\_\_\_\_

21. What techniques could you use to provide maximum independence for your family member? \_\_\_\_\_  
\_\_\_\_\_

22. Are there aspects about your vision for your family member that have changed? \_\_\_\_\_  
\_\_\_\_\_

23. What action will you take to achieve your vision? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_