

Secure Planning Strategies

BUILDING EXTRAORDINARY FUTURES



SPECIAL NEEDS PLANNING QUIZ

How prepared are you in planning for your special needs child? Please take a moment and fill out this brief questionnaire to find out:

- _____ 1. Do you or your spouse have a vision of how your child would live if the both of you are not around?
- _____ 2. Have you identified a guardian, conservator, or trustee for your child?
- _____ 3. Do you have an understanding of Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) government benefits?
- _____ 4. Will your child have adequate health insurance?
- _____ 5. Have you begun setting aside money for you special needs child?
- _____ 6. Do you have a written Letter of Intent?
- _____ 7. Are either your special needs child(ren) or non-special needs child(ren) being excluded in your current estate planning documents?
- _____ 8. Do you have a special needs or supplementary trust set up to preserve government benefits?
- _____ 9. Have provisions been made to fund these trusts with assets or insurance?
- _____ 10. Have you coordinated your special needs planning with other relatives?
- _____ 11. Have you planned where your special needs child will live if you are not around?

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