

SAMPLE

Secure Planning Strategies



Letter of Intent for Susie Smith

To Whom It May Concern:

This "letter of intent" is to introduce you to a wonderful person, our daughter, Susie. Susie is an outgoing, friendly, and caring person. She communicates well verbally and is usually cheerful and good-natured.

Important Names, Addresses and Telephone Numbers for Family Use

Supports Coordinator: Michael Adams, Community Mental Health, 123 Main, Anywhere, USA 45678. (123)456-7890.

Supports Supervisor: Michelle Anderson, Community Mental Health, 123 Main, Anywhere, USA 45678. (123)456-7891

Attorney: John Jones, 456 Center Street, Anywhere, USA 45678. (123)456-8901.

Important Family Members

Holly Smith, sister. 789 Water Street, Anywhere, USA 45678. (123)456-9876.

Allen Smith, brother. 234 Brown Avenue, Anywhere, USA 45678. (123)456-2345.

Family History

Susie was born in 1970 in Anywhere, USA. She has lived here all of her life. She has attended the local high school. Her experience at Center High School was positive.

She likes to spend time with her brother and sister and their families. Her siblings are very strong advocates for her. Her brother is a social worker and works as a counselor at Center High School. Her sister is an elementary school teacher.

She often spends evenings and weekends with her siblings. Her father is a retired professor and her mother is the librarian for Anywhere's public library. She looks forward to retirement next year.

Living Arrangement

Susie lives at 721 Main in Anywhere in a home owned by her parents. She pays rent to them. She shares her home with another young lady. They have a dog named Snoopy. They share chores around the house, often having dinner with one another. We hope that this arrangement continues for some time. However, as a general rule, we prefer that she share her home with someone of like abilities. Choosing a roommate is up to her. Susie and her roommate share the cost of utilities, including the telephone bills and groceries. Susie has her own bedroom. She likes a bed with a firm mattress. She has a television in her room, along with a VCR. She also has a stereo that she shares with her roommate. They share chores around the house. Outside maintenance is done by a local lawn and maintenance service.

Personal Information

Susie bathes daily, often two times a day. She likes to visit the hairdresser once a month. She uses an Electric Shaver to shave her legs. She prefers a bath to a shower. However, staff should listen when she runs the bath water as she tends to allow the water to run over the side (she likes water!)

At times, Susie needs help dressing appropriately. She does not pay close attention to the weather and she often likes to wear "favorite" clothing many times in a row. She requires help with laundry and dry cleaning. She loves to shop for her own clothing but she does not like to try the clothing on before purchasing, often basing her choices on color and style.

Susie loves to eat. She does not pay very close attention to nutritional choices. She is not very good at using the stove, but she is a whiz with the microwave. She likes to eat out at least once a week. She does not like alcohol and she does not smoke.

Entertainment

She loves to go out. Whether it is to shop, go to the movies, or eat out, she is a willing companion. She enjoys renting movies for the VCR, doing jigsaw puzzles, board games, and drawing pictures.

Susie has always gone on vacation with her family, at least once a year. She enjoys traveling and is a pleasant companion. Packing appropriately, as with dressing, is very difficult for her. She tends to pack too many things, trying to sneak in her favorite games and family photos. She likes to take her camera and is very good at taking the perfect picture!

Susie loves to watch the evening news, especially local news shows. She has difficulty with reading, but she does like to look at the newspaper.

Financial Information

Susie receives SSI and Medicaid. She does not have a job, but she does volunteer her time at the local high school and library.

She has difficulty managing her money. If she has money in her pocket, she will spend it. She is unable to discriminate between large and small sums of money - one dollar is the same as one hundred dollars. She has difficulty with the concept of saving her money. In the past, her parents have always managed her finances. Recently, her siblings have taken more interest in that aspect of her life.

Susie executed a Durable Power of Attorney approximately one year ago. She has a copy among her records in her file cabinet. Her parents, siblings and her attorney also have copies of the document.

Medical

1. Family doctor: Dr. Stevens (123) 777-7778
2. Psychiatrist: Dr. Johnson (123) 777-7888
3. Dentist: Dr. White (123) 456-0000
4. Therapist: Dr. Circle (123) 456-7000

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