



Estate Planning Overview

What is Estate Planning?

Estate planning is when a parent/guardian plans for the protection of their child's eligibility of state benefits and other services. This type of planning is useful for many different purposes, including:

- Lifetime money management for the benefit of the child
- Ensuring money is available for future use in the event public funding should cease or be restricted.

Estate Planning for a child with developmental disabilities requires specific steps. Use the following check list as a starting point.

Special Needs Estate Planning Attorney's

- Look for an attorney with expertise in special needs estate planning.
- Interview special needs attorneys before deciding which to choose.

Special Needs: A Letter of Intent

- Carefully consider what kind of life you would like for your child.
- Create a letter for future caregivers stating your desires.
- Include your child's medical history and personal care needs.
- Share this document with family members and friends you trust.
- Regularly review this letter and update it as needed.

Special Needs Trust

- Carefully discuss with a qualified attorney any trust you set up.
- Confirm any inheritance that will keep your child from being eligible for state benefits and services.
- Select an informed trustee- an individual or financial institution, or both to manage financial decisions.
- Make sure anyone leaving your child money directs it to the trust and NOT the child.