

A Blueprint for Special Needs Planning

A Guide To Helpful Action Steps You Can Take To Plan For The Future

STEP 1: COMPLETE AND SAVE YOUR LETTER OF INTENT

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|---|------------|
| DATE YOU WILL DOWNLOAD THE TIME TO PLAN IS NOW'S FILLABLE LETTER OF INTENT TEMPLATE | DATE _____ |
| DATE YOU WILL START TO WORK ON A LETTER OF INTENT FOR YOUR SPECIAL NEEDS LOVED ONE | DATE _____ |
| DATE YOU WILL COMPLETE YOUR LOVED ONE'S LETTER OF INTENT | DATE _____ |

STEP 2: CHECK AND CORRECT ALL BENEFICIARY DESIGNATIONS

WHAT DO YOU OWN THAT HAS OR REQUIRES A BENEFICIARY OR JOINT OWNER?

LIFE INSURANCE
 PENSIONS/ANNUITIES
 RETIREMENT ACCOUNT (IRA, Roth IRA, 401k, 403b, etc)

BANK ACCOUNTS
 INVESTMENTS
 COLLEGE SAVINGS ACCOUNTS
 PROPERTY/BUSINESS INTERESTS

| | |
|--|------------|
| DATE YOU WILL CHECK THE BENEFICIARIES/ACCOUNT OWNERS ARE UP-TO-DATE AND CORRECT | DATE _____ |
| DATE YOU WILL MAKE CORRECTIONS TO ANY DESIRED BENEFICIARIES OR ACCOUNT DESIGNATIONS | DATE _____ |
| DATE YOU WILL INQUIRE IF OTHERS HAVE NAMED YOUR SPECIAL NEEDS LOVED ONE AS A BENEFICIARY | DATE _____ |

STEP 3: OPEN AND FUND AN ABLE ACCOUNT

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|--|------------|
| DATE YOU WILL BEGIN TO LOOK INTO AND COMPARE ABLE ACCOUNT OPTIONS IN AND OUT OF YOUR STATE | DATE _____ |
| DATE YOU WILL OPEN AN ABLE ACCOUNT FOR YOUR SPECIAL NEEDS LOVED ONE | DATE _____ |
| DATE YOU WILL CONTRIBUTE INITIAL FUNDING FOR THE ABLE ACCOUNT | DATE _____ |

STEP 4: CONFIRM AND OBTAIN LIFE INSURANCE

| | |
|--|------------|
| DATE YOU WILL CHECK THE AMOUNT OF LIFE INSURANCE THAT YOU HAVE THROUGH WORK | DATE _____ |
| DATE YOU WILL CHECK THE AMOUNT AND TYPE OF LIFE INSURANCE THAT YOU OWN PERSONALLY | DATE _____ |
| DATE YOU WILL CHECK WHEN YOUR WORK AND PERSONAL LIFE INSURANCE BENEFITS END | DATE _____ |
| DATE YOU WILL CHECK IF YOUR SPOUSE/PARTNER (OR CHILD'S OTHER PARENT) OWNS ANY LIFE INSURANCE | DATE _____ |

STEP 5: SEEK AND OBTAIN LEGAL GUIDANCE

WHAT LEGAL DOCUMENTS AND PLANNING HAVE YOU ALREADY PUT IN PLACE OR STARTED TO WORK ON?

WILL
 POWER OF ATTORNEY
 HEALTH CARE PROXY
 SPECIAL NEEDS TRUST
 GUARDIANSHIP (OR ALTERNATIVES)

| | |
|---|------------|
| DATE YOU WILL BEGIN TO LOOK INTO GETTING ADDITIONAL LEGAL ADVICE | DATE _____ |
| DATE YOU WILL BEGIN TO SEARCH FOR A SPECIAL NEEDS TRUSTS & ESTATES ATTORNEY | DATE _____ |
| DATE YOU WILL BEGIN TO TAKE ACTION ON LEGAL RECOMMENDATIONS | DATE _____ |



THE TIME TO PLAN IS NOW
THE BEST TIME TO PLANT A TREE
 IS 39 YEARS AGO, AND TODAY.

www.TheTimeToPlanIsNow.com

Ezekiel "Zeke" Zimmerman, MBA, CLTC

Certified Financial Services
 Paramus, NJ and New York, NY

Phone: (917) 374-6137
zeke_zimmerman@cfsllc.com

