



## SECURITY FINANCIAL MANAGEMENT

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### Planning Checklist

*Imagine for a few minutes that you are no longer able to care for the person with the disability due to illness or death. Will the person enjoy the same comfortable standard of living that he or she enjoys now?*

1. Do you have a written plan to let others know what you want in the future?  
 YES  NO
2. Have you asked someone to serve as an advocate or guardian?  
 YES  NO
3. Do you understand all of the government benefit programs that are available for basic care and supervision?  
 YES  NO
4. Have you set aside any additional funds so the person will have a comfortable living?  
 YES  NO
5. Have you prepared written instructions for the person's final arrangements?  
 YES  NO
6. Do you and your spouse have current Wills that will exclude your child with a disability?  
 YES  NO
7. Do you have a Special Needs Trust to manage current and future resources?  
 YES  NO
8. Have you met with relatives and friends to let them know about your plan?  
 YES  NO
9. Have you reviewed your plan in the last year?  
 YES  NO
10. Do you feel that you have done everything possible for the person's future?  
 YES  NO

**Unless you have answered “YES” to all of the above, it’s probably time to bring in a Life Planning Team!**

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