



Consolidated
Planning Group

Planning for Special Needs



Consolidated Planning Group, Inc.
281-690-1177
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Special Needs Planning

- ❖ Protection Plans
- ❖ Lifetime Care
- ❖ Transition Planning
- ❖ ABLE Accounts
- ❖ Advocacy





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What is a Letter of Intent? Why do I need one?

Allison Schaberg | Special Needs Planning Advocate

WHAT IS A LETTER OF INTENT?

The important part of planning for the future of your child with special needs is a “**Letter of Intent.**”

This is a document that ensures your trustee or guardian knows your child’s functional abilities, routines, interests, and particular likes and dislikes.



DO I REALLY NEED A LETTER OF INTENT?

When I already have:

- Last will and testament or revocable trust.
- Special needs trust
- Guardianship, POA, HCPOA

Ensuring your child's financial future is only one facet of a comprehensive plan designed to care for your child with special needs.

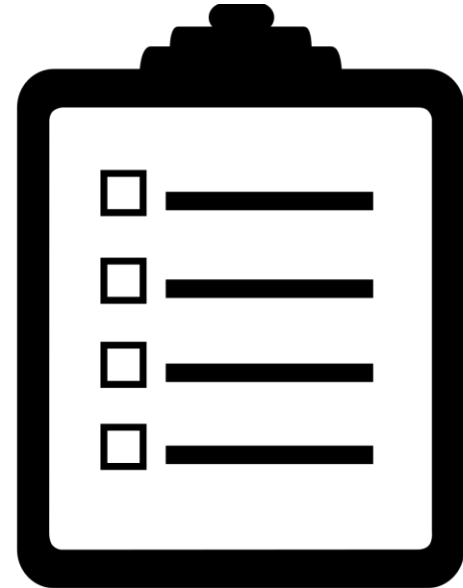
A Letter of Intent communicates YOUR knowledge, including specific hopes and desires for your child's future well being.

- Identifies diagnosis and health history
- Identifies medications
- Treating Physicians
- Likes, Dislikes, Allergies, Etc.



WHAT IS LISTED IN A LETTER OF INTENT?

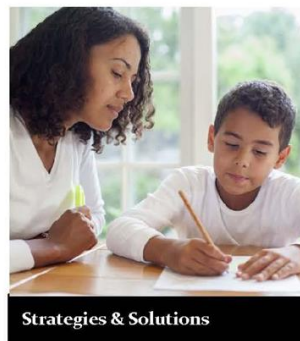
- Family Information
- Medical History and Care
- Government Benefits
- Living Arrangements and Accommodations
- Educational History
- Employment History
- Personality and Habits
- Recreation and Fitness
- Spirituality and Values
- Legal Guardians
- Special Needs Trust
- Power of Attorney - Finances
- Power of Attorney - Medical
- Location of Important Information (Insurance Policy, Bank Accounts, etc.)
- Contacts (Attorney Accountant, Special Needs Financial Advisor, Insurance, Bank)
- Final Arrangements





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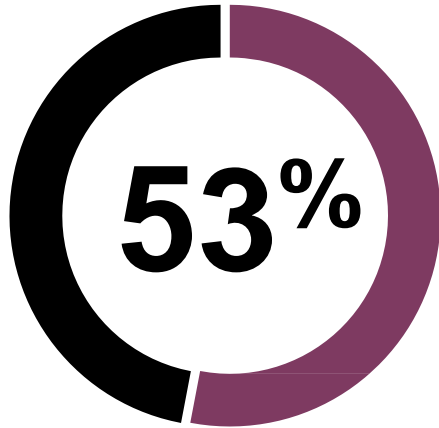
Planning for Special Needs: Letter of Intent Workbook



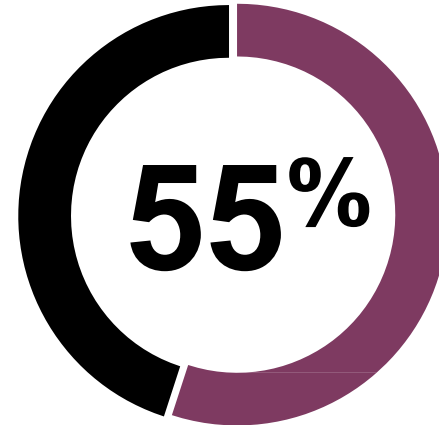
Strategies & Solutions

Inform future caregivers
of your intentions for
the care of your child

CAREGIVER CONCERNS



of caregivers said their own health had worsened due to caregiving and that their declined health affected their ability to provide care¹



of caregivers are unaware of how to establish a lifetime financial plan for their special needs dependent²

1. Family Caregiving: The Facts. Division of Population Health, National Center for Chronic Disease Prevention and Health Promotion. <http://www.cdc.gov/aging/caregiving/facts.htm>
2. <https://www.theamericancollege.edu/designations-degrees/ChSNC>

Click the link below for our
upcoming webinars:

Upcoming Webinars



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Get Connected:

- Contact local VR office
- Call the TWS-VRS statewide call center at 512-936-6400
- Online self-referral “Start My VR” located on the right side under contacts at:
<https://twc.texas.gov/jobseekers/vocational-rehabilitation-services>
- Find your local VR Office at: www.twc.Texas.gov/VRNearMe
- Email us at: VR.office.locator@twc.texas.gov

VR Pre-ETS what are they?



Pre-Employment Transition Services:



1

Career Exploration



2

Work-Based Learning



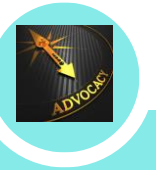
3

Counseling on Post-
Secondary Options



4

Work Readiness



5

Self-Advocacy

Student HireAbility Navigator Texoma:

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<https://forms.office.com/r/FvBbcnbh6>

Q



THINGS THAT SHOULD BE ON YOUR SPECIAL NEEDS PLANNING RADAR:

- How to develop a comprehensive Special Needs Care Plan
- Future Care Cost Estimates
- Texas Waivers-Interest Lists
- SSI & SSDI-Understanding the differences and knowing when to apply
- ABLE Accounts
- Beneficiary Designations
- Special Needs Trusts - How to fund them - Child Support post 18 redirected to a SNT
- Start touring Residential Living Facilities at age 15
- Guardianship, POA, HCPOA or Supported Decision Making
- Consider Guardianship 6 months before turning 18
- Post High School Education Options
- Waiting Lists for Community based care facilities

MEET THE CONSOLIDATED PLANNING GROUP TEAM!



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To schedule a free, personalized consultation:

- 1. Open the camera app on your phone*
- 2. Hover over QR code*
- 3. Click link!*



Contact information:

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