

BRINGING YOU PROTECTED TOMORROWS

Your Journey Through An Eight Step Special Needs Planning Program

My Take-Aways: What I have accomplished and what I need to do next.



STAGE 1: TAKE a Candid Look™		STAGE 2: CREATE the Future Map™		STAGE 3: FILTER the Legal Options™		STAGE 4: CAPTURE Potential Benefits™	
<p><i>Dreams & Goals</i></p> <hr/> <p><i>Concerns & Fears</i></p>		<p>Income</p> <p>SSI _____</p> <p>Medicaid _____</p> <p>Family _____</p> <p>Other _____</p> <p>Expenses</p> <p>Living _____</p> <p>Medical _____</p> <p>Recreation _____</p> <p>Education _____</p> <p>Other _____</p>		<p>SPECIAL NEEDS TRUSTS</p> <p>Ideas for Money People</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Ideas for Care People</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p><small>** PWD - Person With Disabilities</small></p>		<p>BENEFIT PROGRAMS</p> <p>SGA \$ _____</p> <p>Income Rules</p> <p>Cash</p> <p>Entitlements</p> <p>SSDI/SSA Medicare</p> <p>SSI Medicaid</p> <p>Needs Based</p> <p>Healthcare, Workshops, Job Coaching, Residential, Etc.</p> <p>Allowable Assets</p> <p>_____</p> <p>_____</p> <p>_____</p>	
STAGE 5: DOCUMENT the Wonder™		STAGE 6: BEGIN the Transition™		STAGE 7: FUND the Future™		STAGE 8: REVIEW and Renew™	
<p><i>Residential</i></p>	<p><i>Education / Employment</i></p>	<p><i>Your Life</i></p>	<p><i>PWD Life</i></p>	<p>TODAY</p> <p><i>Assets</i> <i>Liabilities</i></p>		<p><i>I Promise to . . .</i></p>	
<p><i>Social Life & Routines</i></p>	<p><i>Medical Care</i></p>	<p><i>Live</i></p> <hr/> <p><i>Learn</i></p> <hr/> <p><i>Work</i></p> <hr/> <p><i>Play</i></p>		<p>FUTURE NEEDS</p> <p>Savings _____</p> <p>Family _____</p> <p>Insurance _____</p> <p>Other _____</p>			