

Instructions to print tri-fold pamphlet:

Print pages 2 & 3 only.

Choose Two-Sided printing with “Short-Edge binding” selected.

Fold the paper in thirds to create your tri-fold pamphlet.

Background And Intentions Checklist

How do you capture and share history? How do you communicate your hopes, plans and desires? These may help:

- Write a plan ("[Letter of Intent](#)") - an overview of hopes, plans and desires.
- Share [Person-Centered Thinking \(PCT\) tools](#) in use -e.g one-pager.
- Identify the Circle of Support with the [Relationship Circle PCT tool](#).
- List gov't programs received - Housing, SS/SSI, Medicare/MediCal - and contacts.
- Compile summary of medical history.

Form The Team - Roles Checklist

Individuals and conservators should identify team members to fill these roles. The following may be family, friends or professionals such as lawyers, fiduciaries, or accountants.

- Team "leader", e.g. Trust Protector who might oversee others
- Successor or Co-Conservators
- Lawyer familiar with Special Needs Trust (SNT)
- SNT Trustees to manage assets, financial and legal affairs or professionals for same
- Social/Emotional Support
- Medical Advocacy/Support
- Other people who manage day-to-day well-being, including Imagine

Financial Checklist

Consult attorneys or appropriate professionals for the following:

- Your estate planning (wills, trusts)
- Include a Special Needs Trust (SNT) to manage assets.
- Identify assets to fund the SNT.
- Should you have an ABLE account?
- Review the tax implications.
- Review the impact on benefits and government programs.
- Identify beneficiaries for assets in the SNT when no longer needed.

Medical Checklist

- Keep an updated [File of Life](#).
- Compile and update as needed a Medical to-go file with a summary of medical history, medications, insurance.
- Include an updated list of medical team members/doctors.
- Discuss and complete "[5 Wishes](#)."
- Consider intentions that guide medical decisions.
- Review with others providing medical advocacy or support.

Housing Checklist

- List options for housing - both current and potential.
- Identify special circumstances like Section 8 vouchers.

Communicating With Your Team

Meet with friends, relatives, service/care providers or others in the circle of support to let them know about your plans. There may be different messages for different people:

- Expected roles
- Expected interactions
- Special instructions for wills, estates
- Authorities granted, e.g through conservatorship
- Familiarity with plans, documents, tools

Consider what materials to share with friends, family members, team members, service providers (such as Imagine) to help transitions go smoothly.

People Resources

- Attorneys - some will identify specifically as special needs attorneys
- Financial Planners - ask if they are certified for special needs
- Attorneys - ask about their history/experience with special needs individuals
- Tax Accountants - ask if they have worked with Special Needs Trusts
- Fiduciaries - may be individuals or organizations - some will identify specifically as special needs fiduciaries.
- Circle of Support

Online Resources

These resources can be useful for finding the above listed professionals, and may also offer training and other resources for parents/conservators to learn.

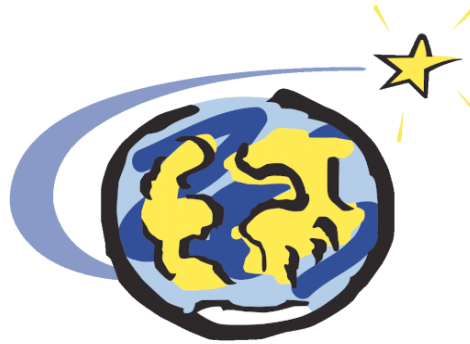
- [Parents Helping Parents](#) - has transition fairs, person-centered training, and other resources for parents.
- [Protected Tomorrows](#) - offers Parent University training as well as a directory of expert advisors for families of individuals with special needs.
- [Special Needs Answers](#) - has a searchable listing of special needs planning professionals (attorneys, financial planners and trust officers) for service and advice .

Imagine Resources

Periodically, Imagine brings together families and friends so that connections can be made. These are perfect times for parents/conservators to ask others about their experiences and knowledge in any of the areas mentioned.

*For more information:
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Imagine SLS Parents/Conservators Life Planning Pamphlet

Congratulations! You care about an adult served by Imagine with Supported Living Services. Imagine has an ongoing promise to be there for each person they serve throughout their lifetime.

There is a real possibility that their lifetime in SLS will be longer than yours. A good life plan provides guidance to future friends, family and caregivers as they support your loved one's continued social, vocational, medical, spiritual and financial development.

This pamphlet is intended to help you prepare for this future - providing continuity and support. The responsibility for this planning resides with you, the parent or conservator. Since this planning affects your loved one, please include them to the maximum extent possible.

