SPECIAL NEEDS WORKSHEET

Planning for a disabled individual is of the utmost importance to ensure that they will not be disqualified from any current or future public benefits that they are/will be entitled to.

<u>Special Needs Trusts</u>: Protecting a beneficiary's own assets (inheritance/settlement proceeds).

<u>Supplemental Needs Trust</u>: Parents/Family members giving an inheritance to disabled individual.

FILL OUT THIS <u>BRIEF QUESTIONAIRE</u> TO HELP US CRAFT YOUR TAILORED SPECIAL NEEDS DOCUMENTS

ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL

DISABLED INDIVIDUAL DETAILS

Name:	SSN (required):
Date of Birth:	
Single Married Date of Marriage:	Divorced Widowed
Address:	
Phone:	Email:
Current Public Assistance: SSI SSDI _	Email: Medicaid Food Housing VA
PARENT/GUARD	DIAN DETAILS (if applicable)
Name:	SSN (required):
Address:	
Phone:	Email:
Name (second parent):Phone:	Email:
Trus	stee Information
power to manage, invest, and control the as	
Multiple Trustees can serve together. For C	Co-Trustees, please include all names on a single line.
Co-Trustee Decision-Making Selection: In	dependent Authority, Majority, or Unanimous.
Name	Co-Trustee Decision-Making Selection
1	
2	
2	

Beneficiary Distributions

<u>Special Needs Trusts</u>: The State is the primary beneficiary for up to the amount that they have paid out in public benefits on behalf of the disabled individual. Please list beneficiaries that would receive any remaining assets after State reimbursement.

<u>Supplemental Needs Trust</u>: There is no State reimbursement. Please list beneficiaries that will receive any remaining assets.

Funds can be left to beneficiaries <u>Outright</u> (one lump-sum distribution) at a given age (the default age if none is listed will be 25).

Funds can be left to beneficiaries <u>In Trust</u>. This means that funds will be dispersed at given ages or in segments of years following death (Examples: at age 25, age 30, age 35 or at 5 years, 10 years, 15 years following death) (can protect beneficiaries from creditors, bankruptcy, divorce).

Name	Share %	Outright/In Trust	Ages/Years

Asset Information

Type of Asset (real estate, bank/stock	Name of Institution (Wells Fargo, Fidelity, JP Morgan) Name of Business (LLC, Scorp)	Individual or Joint Ownership
acct, life ins, CDs,	Address (real estate)	(who's the owner)
mineral/water,		
LLC, Scorp)		