

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.

Special Needs Trusts: Protecting a beneficiary's own assets (inheritance/settlement proceeds).
Supplemental Needs Trust: Parents/Family members giving an inheritance to disabled individual.

FILL OUT THIS BRIEF QUESTIONNAIRE 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 ___ Medicaid ___ Food ___ Housing ___ VA ___

PARENT/GUARDIAN DETAILS (if applicable)

Name: _____ SSN (required): _____
Address: _____
Phone: _____ Email: _____
Name (second parent): _____
Phone: _____ Email: _____

Trustee Information

Trustees are the individuals who will be in charge of managing the trust. They will have the power to manage, invest, and control the assets the trust will own.

Multiple Trustees can serve together. For Co-Trustees, please include all names on a single line.

Co-Trustee Decision-Making Selection: Independent Authority, Majority, or Unanimous.

Name	Co-Trustee Decision-Making Selection
1. _____	
2. _____	
3. _____	

