**Planning for Special Needs (Outline)**

**The Future Care Plan**

**Michael T. Byrne**

**Lighthouse Planning Consulting**

1. Parents Must Face Hard Personal Decisions: Programs, Services, Age of Maturity
2. Four Stages of Life: Infant, Adult with, Adult without, Passing
3. Determine Financial Needs: Paying, From Where
4. Goal is to Create a Plan that Maximizes Benefits & Supports
5. Benefit Programs: SSI, SSDI, SSRI
6. Medicaid Eligibility: SSI
7. Understanding Benefits: Income Rules, Entitlement/Need, Income and Asset Rule
8. Supplemental Security Income (SSI): Earned Income, Unearned Income, In-Kind Income
9. Fee For Service Model: Budget, Support, Self Service
10. Support Service: Community, Programs, Technology
11. Housing Update: Problems
12. Transportation Option
13. Understand Your Legal Options
14. Special Needs Trust Pros and Cons
15. ABLE Accounts: Pros and Cons
16. What I Should Remember About Wills & Trusts:
17. Selection of Trustee
18. Distributions From the Trust: How, and uses
19. Choosing Care People: When you can’t
20. The Alternatives: Invoke Power of Attorney Rights
21. What is Guardianship: How to get it
22. What is Power of Attorney: Information, Limits
23. How do I get Guardianship: On your own, With Help
24. Document the Story: Family Communication
25. Questions: