

Securing Futures Together

Legal Strategies for Long-Term Special
Needs Care



WELCOME



A Parent's Story



The importance of planning



Legal tools & strategy

Morgan's Story & Our Journey



**Diagnosed with Spina Bifida
& Hydrocephalus**



**Bright spirit, full of love
and life**



**Taught us about strength
and patience**

Key challenges:

1

**Medical
appointments**

2

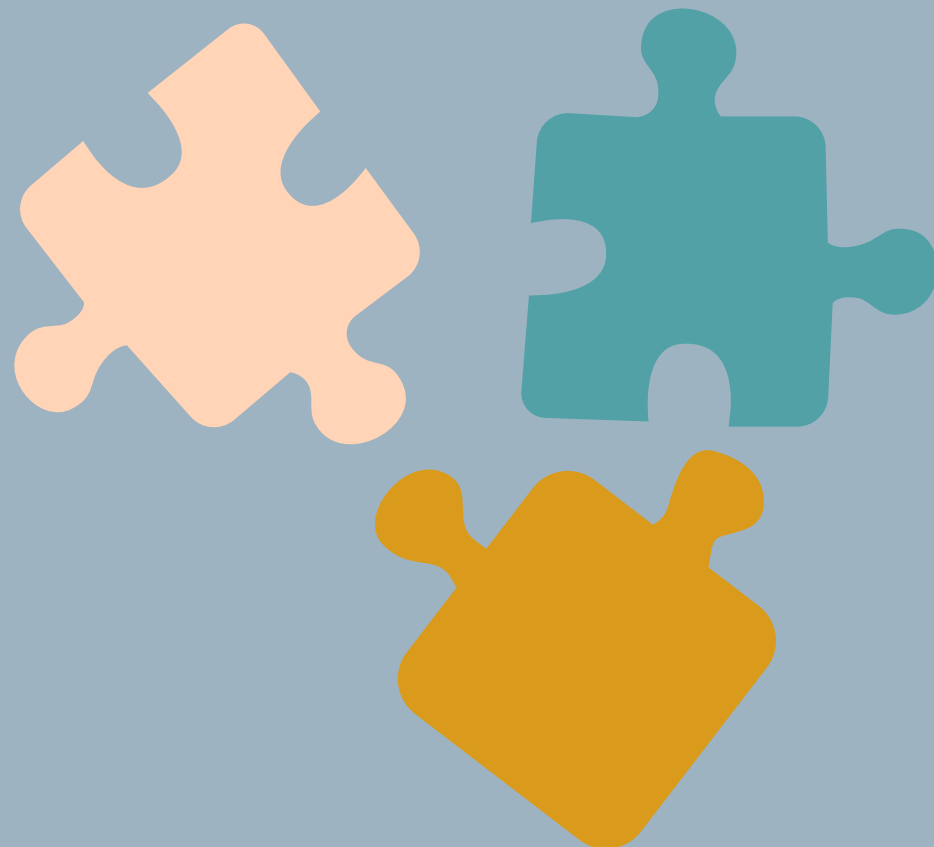
School IEPs

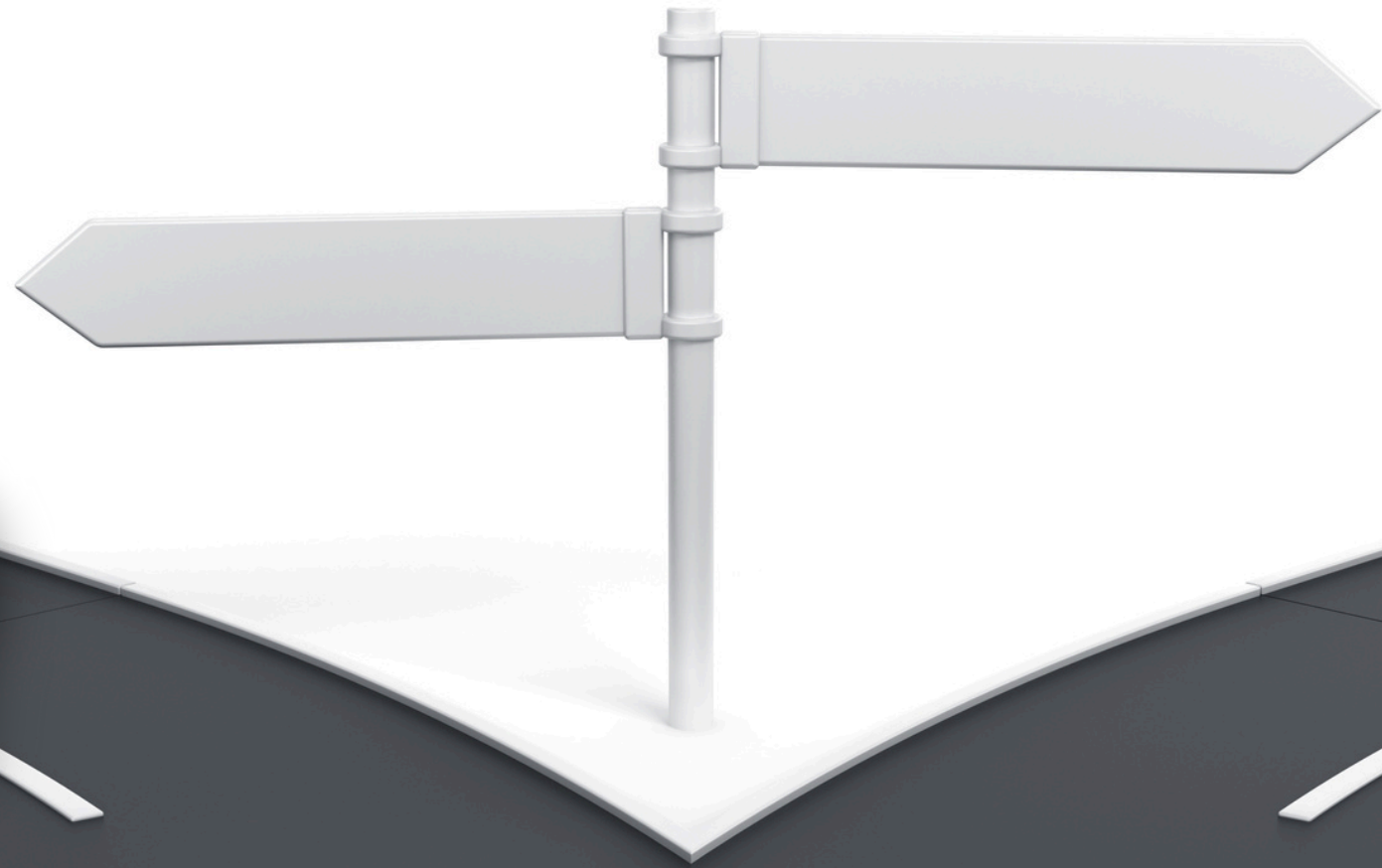
3

**Caregiving
logistics**

4

**Advocating for
services**







We were not legally or financially prepared

The peace of mind we lacked

Families need a plan before crisis hits

Why Planning Ahead Matters



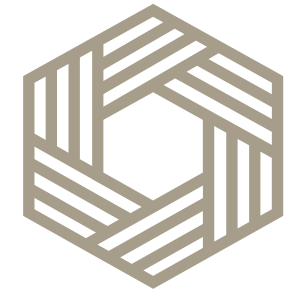
**Emotional
relief**



**Continuity of
care**



**Security of
benefits**



**Preserving
dignity and
wishes**

Bridging to Legal Solutions



Guardianship

What if something happens to me?

Access to funds

What is a trust?

Special needs trusts

How do I protect benefits?

Housing/future caregiving

Who will take care of my child?



Bridging to Legal Solutions

**"What happens if something
happens to me?"**

"Do I need a will or a trust?"

**"Can my child still receive
benefits if I save for them?"**



**Not all estate
plans are equal
for special needs**

**Benefits can be
lost without
planning**

Special Needs Trusts

- ✓ Protects eligibility for SSI/Medicaid
your agenda point
- ✓ Allows family to provide extra
support



**What is an
SNT?**

Guardianship

- ✓ Turning 18: legal adult
- ✓ Full guardianship vs supported decision-making



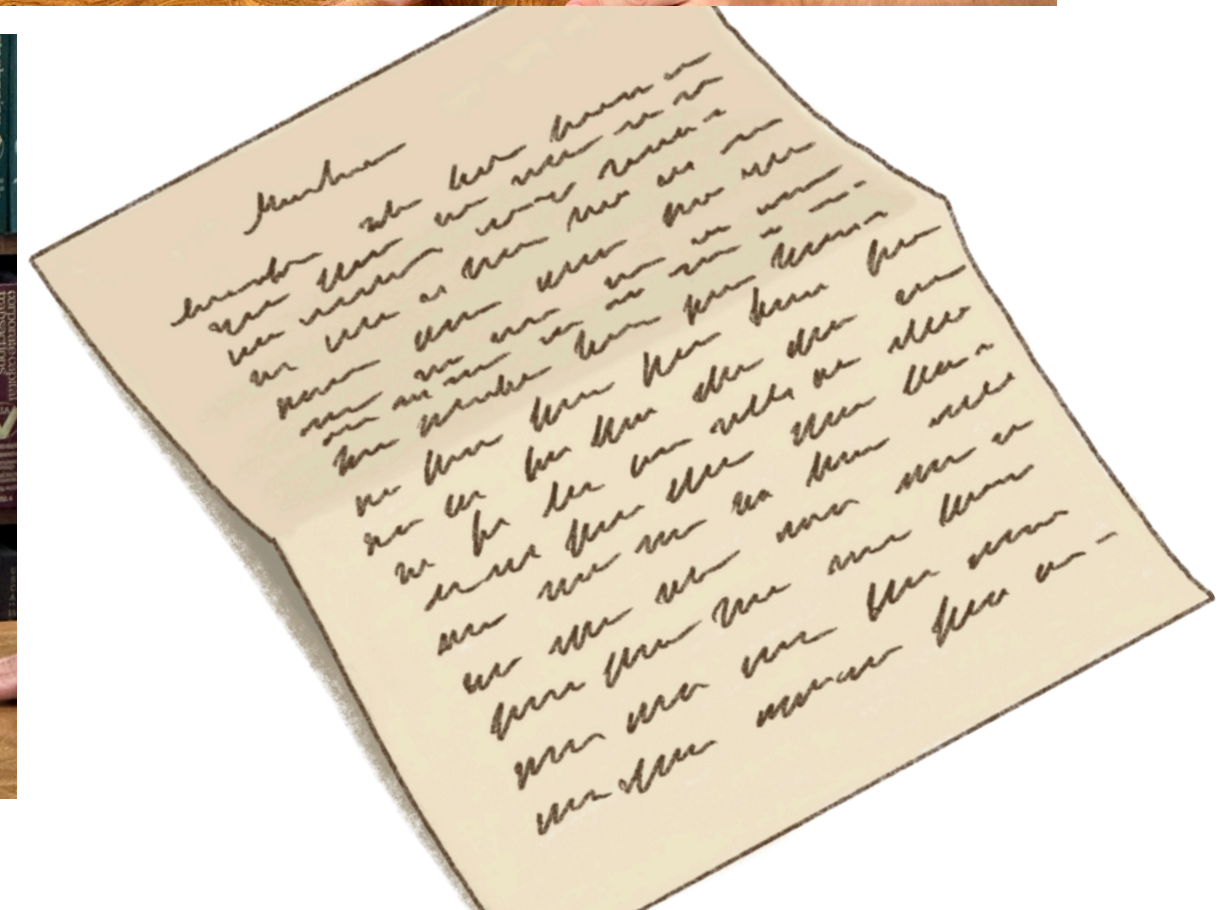
Wills & Letters of Intent



Direct assets properly



Share your child's story and routines



Powers of Attorney

✓ For you and your child

✓ Financial and healthcare decisions



ABLE Accounts



**Save money
without losing
benefits**



**Up to \$100,000
without affecting SSI**

Mistakes to Avoid



Naming your child as direct beneficiary



Not updating plans



Verbal wishes only





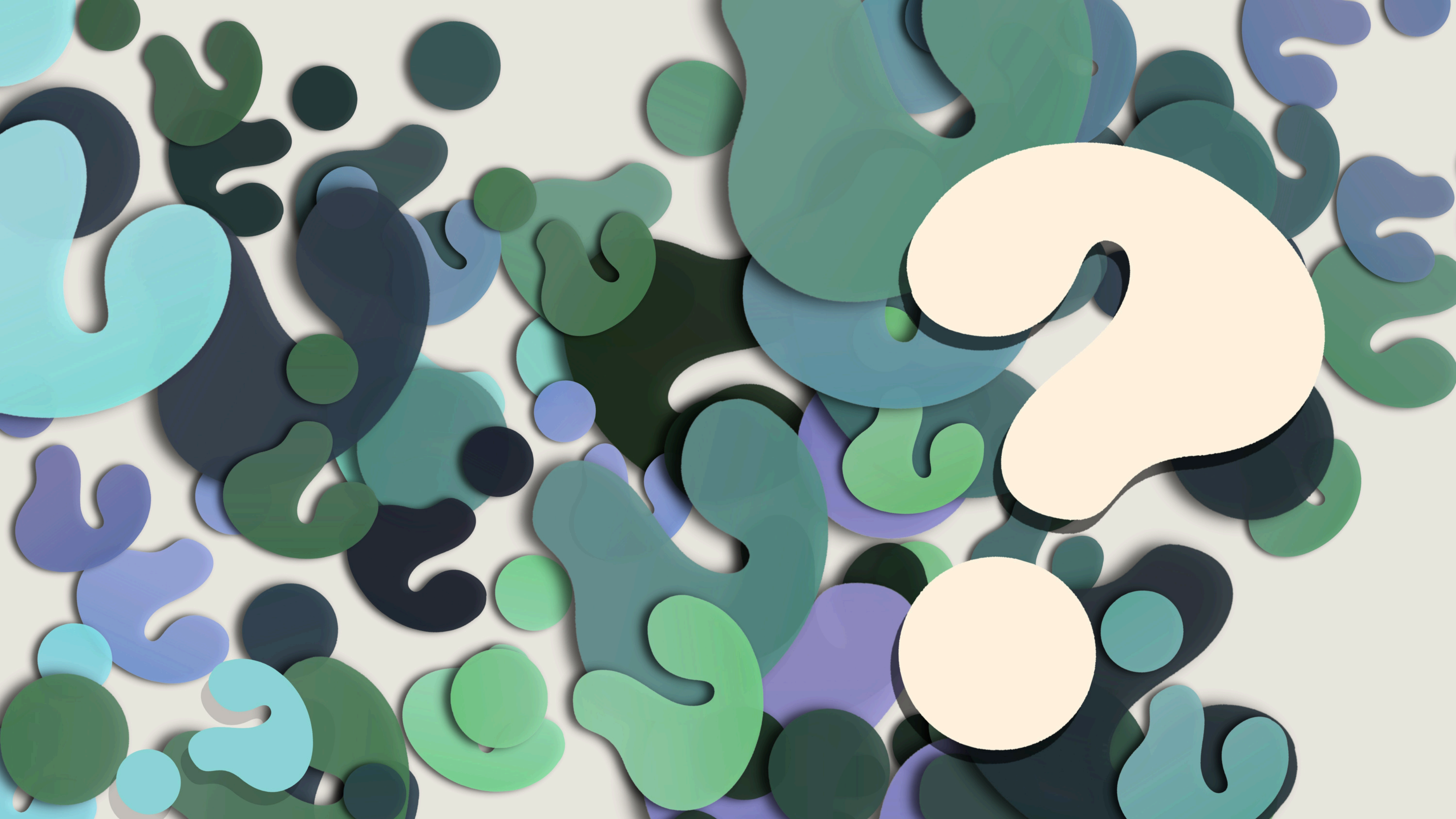
When to start: **Now**



Who should be involved:
attorney, planner, family



First steps checklist



**“Planning
isn’t about
fear of the
future—it’s
about love in
action today.”**



Thank you



Download:
Letter of Intent

