


FUTURE PLANNING CHECKLIST

Steps to consider when planning for the future of your loved one with an Intellectual/Developmental Disability or TBI:

FUTURE PLANNING TASK:	
<input type="checkbox"/>	Do you have a Will, or a recently updated Will?
<input type="checkbox"/>	Have you prepared a Letter of Intent pertaining to your family member?
<input type="checkbox"/>	Do you have an Executor named?
<input type="checkbox"/>	Do you have a Special Needs Trust or participate in a Pooled Trust?
<input type="checkbox"/>	If so, do you have a personal and/or agency Trustee?
<input type="checkbox"/>	Do you need or want a Trust Protector?
<input type="checkbox"/>	Do you have life insurance or other means to fund a Trust?
<input type="checkbox"/>	Have you considered alternatives to Guardianship? For example:
<input type="checkbox"/>	Does your family member have a Representative Payee?
<input type="checkbox"/>	Has your family member given you Power of Attorney?
<input type="checkbox"/>	Has your family member given you Health Care Power of Attorney?
<input type="checkbox"/>	Does your family member have a Supported Decision Making Agreement?
<input type="checkbox"/>	Does your family member have a personal support network?
<input type="checkbox"/>	If you plan to pursue Guardianship, do you know what steps to take?
<input type="checkbox"/>	Do you have an Attorney that specializes in Disability issues?

If you can check off any of these boxes, congratulations! You have begun your planning and are ahead of the majority of people! If not, and you would like to begin, there are many resources available to help you. (See Back)

		FUTURE PLANNING RESOURCES	
		Phone Number	Website
	919-251-8368	www.fifnc.org	
Lifetime Connections offers crucial supports such as personal networks and future planning information to people with all types of disabilities and their families.		www.fifnc.org/programs/connections.html www.facebook.com/lifetimeconnections	
NC Sibs is a statewide group of adult siblings of individuals with developmental disabilities. Its purpose is to connect siblings with one another to provide support and information specific to the unique aspects of the adult sibling relationship.		www.ncsibs.org www.facebook.com/NCSibs	
The Arc of North Carolina	800-662-8706	www.arcnc.org	
North Carolina Guardianship Association	919-266-9204	www.nc-guardian.org	
NC Division on Aging and Adult Services (DAAS)	919-855-3400	www.ncdhhs.gov/aging	