

# Special Needs Provisions

Do you have a special person (family member or friend) or pet in your life that might suffer in the event of your disability or death? **Picture their situation without your love, care and support.** What provisions have you made to replace your economic value and care for this individual or pet?

Some issues to consider might be:

- Why is this person or pet important to you?
- Who would you want to take care of this special person or pet if you could not?
- How long might that care be needed?
- What resources have you made available for that care?
- How would your replacement caretaker have access to these resources?
- Who or what entity is the backup or successor if your first replacement caretaker is not able or willing to step in for you?
- How will your replacement caretaker's lifestyle or career be impacted by taking over the care that you were providing?
- How will your replacement caretaker be compensated for the time and expense involved, and changes required in their life?
- Do the right people have a Durable Power of Attorney for you if you are incapacitated? What powers are granted?

- Does your Will or Trust indicate your current wishes for what you want to have happen for your special person or pet?
- What support services have you already engaged in the process of currently caring for the special needs of this family member?

Planning ahead for disaster can make a world of difference for you and those depending on you. Let those you love **know** that you truly love them by making sure that they will be secure even if you are no longer able to provide for them.

Verify that today by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time.

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!