

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"/>	Do you 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 Elder Care or is knowledgeable about 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..



FUTURE PLANNING RESOURCES		
AGENCY	PHONE NUMBER	WEBSITE
First In Families of North Carolina	919-251-8368	www.fifnc.org
The Power of the Dream, Inc.	919-348-9763	www.thepoweroftedream.org
The Arc of North Carolina	800-662-8706	www.arcnc.org
North Carolina Guardianship Association	919-740-9416	www.nc-guardian.org
North Carolina Division on Aging and Adult Services (DAAS)	919-855-3400	www.ncdhs.gov/aging
Supported Decision Making		www.dcqualitytrust.org www.supporteddecisionmaking.org
Lifetime Connections offers crucial supports such as personal networks and future planning services to people with disabilities.		www.fifnc.org/programs/connections.html www.facebook.com/lifetimeconnections
NC Sibs is a statewide group of adult siblings of individuals with developmental disabilities that connects siblings with one another and with resources specific to their unique future planning needs.		www.ncsibs.org www.facebook.com/ncsibs www.siblingleadership.org

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