



FAMILY WEALTH PLANNERS  
PERSONAL TAX ADVISORS  
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## ***Special Needs Assessment- Sorting Through the Maze for the Long Term*** (12/11)

*Every family who has a special needs individual is blessed with added meaning to life but also has added responsibilities. The moments of pleasure are many and exhilarating but the need to find solutions to the many problems are daunting and at times discouraging. Be as it may, parents, siblings, family and community must all pull together to help out in as transparent a way as possible. It is important to have a total financial plan for the special needs individual and their families – to be able to look at the big picture and know that all of the pieces fit together. We hope that this **Special Needs Assessment** will help you get things into perspective – one step at a time.*

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Assign a priority level to each of these areas for follow up and action:

Needs Significant Attention	A
Quite Important	B
Issue Dealt With	C

- Income** (social assistance, family gifts, tax credits, Henson trusts, RDSPs) \_\_\_\_\_
- Long Term Savings** (trusts, gifts, bequests, life insurance, tax plans) \_\_\_\_\_
- Housing** (financing, assisted living, attendant care, special facilities) \_\_\_\_\_
- Social Assistance** (financial and medical needs, financial limitations, financial tradeoffs) \_\_\_\_\_
- Legal Capacity** (legal competence, property ownership, financial account ownership, wills , guardianship) \_\_\_\_\_
- Caregiver** (full-time support, special requirements, cost, government grants, changing needs, long term continuity) \_\_\_\_\_
- Daily Living** (physical and cognitive support, personal care, community involvement, communications, financial management) \_\_\_\_\_
- Estate Planning** (wills, powers of attorney, executors and trustees, beneficiary designations, trusts, family conflicts, legal capacity) \_\_\_\_\_
- Medical Issues** (availability, cost, government funding, community services) \_\_\_\_\_
- Parents Dilemma** (financial fairness, ageing, changing issues, wealth continuity) \_\_\_\_\_