

**Denise N. Yurkofsky**  
**Attorney at Law**

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13 Pelham Island Road  
Wayland, Massachusetts 01778

Telephone (508) 358-4878  
Facsimile (508) 817-5435

**SPECIAL NEEDS PLANNING**  
**Preparing a Life Care Plan or Letter of Intent**

If you have a child (or other family member) with special needs, it is vital that you put in writing the information which would be helpful to the people who may be taking care of your child in the future. Who should these people be and what would they need to know if you weren't there to advise them? This writing is sometimes referred to as a "life care plan" or a "letter of intent". It is not legally binding but is an extremely important part of your estate plan.

No one knows your child's personality, needs, daily routine, interests, educational program and medical history as well as you do. Any guidance you can provide will help your child's future caregivers know your child, meet your child's needs and provide for his or her well being in accordance with your wishes and expectations. Preparing the memorandum will also help you clarify and achieve your goals for your child's future.

In the Life Care Plan you may want to cover the topics listed below. It can be as detailed as you wish and can include personal experiences as examples. I am also providing a form which can be used and modified to address your child's unique situation. The Life Care Plan should be signed, dated and kept with your legal documents. You should review it at least once a year and update it as needed.

1. **Personal History:** Describe your child's life to date, personality traits, daily routine, food preferences, sleeping habits, likes and dislikes, important people in your child's life, community involvement and your vision for your child's future.
2. **Family History:** Describe your family, the role your family plays in your child's life now, the role you hope family will have in the future, special traditions and important connections.
3. **Medical History:** List current doctors, therapists, clinics (how frequently your child attends and for what purpose), current medications (how given and for what purpose), and past medication issues (what medications have not worked in the past).
4. **Education:** Summarize your child's educational experience and desires for future education (regular classes, special classes, special schools, related services, etc.), extra curricular activities and recreation (including specific programs and related services providers).

5. **Employment:** Describe what types of work your child enjoys or you expect your child would enjoy and in what setting (open employment with supervision, sheltered workshop, etc.).
6. **Residential Preferences:** Describe what you envision as the best living arrangement for your child (living independently, with relatives, in a group home, rooming preferences, etc.).
7. **Interests:** Describe your child's interests and hobbies. What places does your child like to visit? What sports, music, movies, shows and/or activities are important to your child?
8. **Behavior:** Describe your child's degree of independence and mobility, now and anticipated in the future (bathing, grooming, ability to handle money, take public transportation, read, tell time and other life skills), any behavior issues and how they are addressed as well as what behavior management programs have not worked in the past.
9. **Religious Background:** Specify your child's religion, the role of religion in your child's life, clergy who know your family and family traditions.
10. **Financial/Estate Planning Information:** Summarize your estate plan. Do you anticipate that a guardianship will be needed for your child and if so, who is or should be the guardian? If your child is over 18, does he or she have a health care proxy or durable power of attorney? If so, who is named to act for your child? Do you have a special needs trust for your child? If so, who is the Trustee? How do you expect it to be funded? Have you estimated the cost of your child's future needs? Do you have an estate plan in place? Who is your attorney? Who is your financial advisor?
11. **Benefit Information:** Specify what benefits your child is receiving or expected to receive in the future.
12. **Other Information:** Provide any other information you think would be helpful, such as support organizations which have been helpful, advocates and advisors.