

Getting it all in Order

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Basic Legal Documents



Will (Last Will and Testament)

Trusts, including Revocable Living Trusts

Medical Decision-making

Financial Decision-making



Medical Decision-making

Healthcare Surrogate

Living Will

Financial Decision- making

Power of Attorney

The Plan

Realize good estate planning is coordinating:

- How assets are titled
- How beneficiary forms are completed
- Having the right legal documents
- Considering the protection our beneficiaries need

Special Needs Beneficiaries



- Divert inheritance into a Special Needs Trust
- Consider whether a Guardianship or Guardian Advocacy is necessary
- Pursue benefits through Social Security and State (Medicaid)

Social Security

- Consider SSI (Supplemental Security Income) at age 18
- Know about DAC (Disabled Adult Child) / CDB Benefits



Medicaid

- For Medical Expenses
- Medicaid Waiver through APD
 - Agency for Persons with Disabilities

ABLE accounts

- www.ableunited.com
- Sheltered for SSI and Medicaid
- Free
- Run by State



Thank You

TRAVIS FINCHUM

SPECIAL NEEDS LAWYERS, PA

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