

# Getting it all in Order

Travis Finchum  
Special Needs Lawyers, P.A.  
Clearwater, Florida

[Travis@SpecialNeedsLawyers.com](mailto:Travis@SpecialNeedsLawyers.com)

[SpecialNeedsLawyers.com](http://SpecialNeedsLawyers.com)



# 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](http://www.ableunited.com)
- Sheltered for SSI and Medicaid
- Free
- Run by State



# Thank You

TRAVIS FINCHUM

SPECIAL NEEDS LAWYERS, PA

[WWW.SPECIALNEEDSLAWYERS.COM](http://WWW.SPECIALNEEDSLAWYERS.COM)