



Life Care Planning Quiz

- Do you or your spouse/partner have a vision of how your dependent with special needs will live after you're gone?
- Have you identified a guardian, conservator, or trustee for your dependent?
- Do you have a complete understanding of Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) government benefits?
- Have you begun setting aside money for your dependent?
- Do you have a written Letter of Intent?
- Are any dependents, whether they have a disability or not, being excluded in your will?
- Does your dependent with special needs have any trusts or accounts established to preserve government benefits?
- Have provisions been made to fund these trusts or accounts with assets, or insurance, if applicable?
- Have you coordinated your special needs planning with other relatives?
- Have you planned where your dependent will live if you are not around?
- Will your dependent be able to earn enough to care for himself or herself?
- Will your dependent have adequate health insurance?

If you are not satisfied with all of your answers, please feel free to contact Jim Thompson CFP, ChFC, CHSNC or Bryan Johnson at 309 263 5092 office or 217 417 5228 Jim's cell for a confidential consultation.