



Special Strategies for Special Needs

Business Name: Seven Oaks Financial LLC
Business Genre: Financial Services
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State: Illinois



Long Business description:

Seven Oaks Financial offers Special Strategies for Special Needs.

Owner, Jim Thompson CFP, ChFC, ChSNC aids families in financially creating a lifestyle and future for their family member diagnosed with a disability.

The process takes the family step by step through each life stage a person reaches. The focus is on financial concerns that need to be addressed and will give additional information concerning legal instruments that they may have to consult with an attorney to consider and implement. These may include issues such as **Life Beyond IEP, Guardianship, Beneficiary designation, SSI, SSDI, the reasons for the necessity of Wills, Letters of Intent, Special Needs Trust, Living Trusts, Powers of Attorney, and the Able account.**

Mr. Thompson does not offer legal advice, nor holds himself to be legal council; but works closely with the attorneys, accountants, insurance representatives to lead a team approach in organizing the special strategies for special needs.

Mr. Thompson also conducts seminars for Advocacy and Family Groups, Special Needs Groups, Special Education Teachers, Administrators, and School Districts on topics such as: **Getting Started on a Life Care Plan, Guardianships, Special Need Trusts, Able accounts, SSI, SSDI, Medicaid, and the 10 common Mistakes in special needs planning.**



Mr. Thompson is a, CFP, Certified Financial Planner since 1996, a ChFC, Chartered Financial Consultant since 2010, and a ChSNC, Chartered Special Needs Consultant since 2012, the initial year it was offered.