

Letters of Intent

WHAT IS A LETTER OF INTENT? WHY SHOULD YOU WRITE THIS DOCUMENT?

You have worked for so long, as your child's advocate, coordinator, taxi driver, health care consultant, and in countless other roles in addition to parent. Maybe you have inherited this role already for a sibling or another relative. Whether your child or relative is still young, or an adult, no one knows him or her like you do. You think that no one can take on this role you have played. Yet, in your heart, you know that they may be called on to do just that – at any time – with or without warning. Emergencies and crises come at all times in life. None of us is immune.

If you were not there, who would know how to help and comfort your relative? Who would know his likes and dislikes, doctors or friends? Where they can find the critical information necessary for your relative to qualify for benefits and supports? How you hoped to see your relative change and grow in the future?

In addition to other legal planning, there's a way to provide another person (or people!) with this critical information, as well as provide your roadmap of where you hoped to lead your child/relative and a summary of things you have learned over the years.

It's called a "Letter of Intent." It can be one of the best tools you can give to those family members and friends, as well as to professionals, who will collectively try to support your child in an emergency, as well as to help him grow more independent and mature, respecting your wishes and continuing your journey. This letter of intent is your final gift to them with information that only you can share - and it can only be prepared in advance.

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HOW DO YOU WRITE A LETTER OF INTENT?

There's no magic formula for this letter, but to help you get started, we have outlined some questions to consider.

- Include items that are important to you and your family, and omit those that do not apply or that are best described in other ways. Think of painting a picture from a landscape – each picture will look different and each artist may include or exclude features.
- Although it is not a legally binding document, it is a good idea to have your lawyer review your Letter of Intent, to make sure it coordinates with your legal documents.
- It is also a good idea to give a copy of your Letter of Intent to someone you trust, or to let someone know where it is located and easily accessible.
- The Letter of Intent is a guide; those friends and relatives reading it are expected to consider your wishes, but to use their own best judgment in supporting your child.
- You may choose to give a copy to your Service Coordinator. The document and the information will remain confidential. The Service Coordinator will not contact the individuals mentioned in the document unless something happens to you, but that information would be immediately available if it was necessary.
- It is a good idea to review your Letter of Intent annually (some people choose to do this on their child's birthday) to make sure the information is up to date.
- Do it now. If you have only started planning, share what you have and add to it as you and your child grow older. Start with what you have; no one is expected to have all the answers and no picture is ever complete.

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LETTER OF INTENT: INFORMATION ABOUT (Child's name)

Remember, these questions should serve as guidelines only. Feel free to adapt this outline to reflect your priorities and family circumstance.

General Information

Full Name of Child

Are there any other names you or your child have used throughout his or her lifetime, under which your child's information may be listed or records might be kept?

Current Address and phone number

Child's Former Addresses and Phone Numbers

Date of Birth

Who are the two people who know the most information about your child? Provide names and contact information for each person.

Is there any other personal information that is important? (Think about information that may not be well known by others, but may be important when applying for services or benefits. Consider including contact information for step-parents, former spouses of parents, citizenship status if other than natural born US citizen, etc.)

Are there professionals who have information about your child or could help your child, and should be contacted immediately if something happens to you? Include contact information. Think about the following types of people:

- Lawyer
- Clergy
- Financial Planner
- Insurance Agent
- Trustee
- Primary care doctor or most involved specialty doctor
- Name of pharmacy
- Therapist, mental health professional

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CURRENT LIFE, IMMEDIATE CONTACTS, EXPECTED CHANGES

Generally describe your child's current life and activities. Include contact information. What changes, if any, do you anticipate in the next two years?

What activities does your child particularly like or dislike? Are there places in your community where they know your child and where she likes to go? Include relevant contact person.

Describe any special supports, services or assistance your child currently receives.

- Who provides them?
- How are they paid for?
- Include relevant contact person and phone number.
- Are there any special concerns that you want to make sure are addressed?

Are there certain things that someone should know about helping your child through particularly stressful times or transitions in your child's life? Is there a special person (or people) and/or a religious or spiritual leader who could provide immediate comfort to your child in the event of an emergency?

What special supports or programs have you applied for, including public benefits? Are you currently on a waiting list for any service? Include the name of the service, the contact person and phone number, the approximate date of the application, and the status.

Who are your child's closest friends (for young children, include playmates)? How can they (or their parents) be reached?

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Are there certain people in your community who might be willing to spend time with your child, take him or her to community events, or help with other things? How can they be reached?

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FUTURE PLANS

Describe your idea of what life would look like for your child in the future. Include things that are most important to you. Where would she live? What would he do during the day? What type of help or support would you envision? What types of activities would she enjoy? What type of work or employment would you suggest be explored?

Identify the friends and/or relatives who may be able to play a role in your child's life. Describe any role you envision or have talked with the person about.

Identify any people, including relatives, who you would NOT want to play a role in your child's life.

If you expect your child to receive day, residential, or other supports from an agency, are there any particular providers or other non-health care professionals who you would like to be considered? Include any relevant names and phone numbers and dates of any applications or interviews.

Provide the name of the person (and alternates if possible) who you prefer to be a primary advocate and a friend for your child.

What are three of the most important things you would want someone to consider when planning for your child's future?

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What are three of the most important things you would want your child to know about your planning or your vision of her future?

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LEGAL AND FINANCIAL INFORMATION

Do you have a will? If so, where is it located?

Do you have a Supplemental Needs Trust for your child? If so, where can the trust document be found? Who is the Trustee? Is there an Alternate Trustee? How can they be contacted?

If you envision your child living in the family home, how is the home titled? What financial arrangements have you made to provide funds for maintenance and other upkeep on the home, while considering the effect on your child's eligibility for public benefits?

If your child is under 18 years old, who would be your first choice to serve as a legal guardian of the person? Who would be your second choice? Include contact information.

If your child is an adult, who consents to current medical care? If your child consents to medical care, does she need assistance in making decisions? If so, who would you suggest provide this assistance?

If you currently consent to medical care (either formally or informally) who would you suggest assume this role?

Have you made any funeral arrangements for your child? Do you have any special wishes? Please describe.

If your child is under 18 years old, who would be your first choice to help manage your child's money or public benefits? Who would be your second choice? Include contact information.

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If your child is over 18 years old, how does he handle his finances at this time? What assistance does he receive? Who would be your first choice to provide this assistance? Who would be your second choice? Include contact information.

List all bank accounts or other financial resources titled in your child's name or held on behalf of your child. Include the name of the financial institution, address, type of account, all owners of the account, and approximate amount in the account.

List any life insurance policies that name your child (or a trust established for your child) as either the beneficiary or insured. Provide the name of the company, status of your child (owner, beneficiary, other) and contact information, and amount of insurance.

Does your child receive Social Security, Supplemental Security Income (SSI) or other cash benefits? If so, list type and amount.

Does your child have a representative payee for any of these benefits? If so, which benefits? List contact information for each representative payee. If you are representative payee, do you have a preference as to the person who would be designated if you were unable to serve? Provide contact information.

If your child has been employed, where has s/he worked?

What type of medical insurance does your child have? List all types, companies, and policies numbers, including private insurance, Medicaid and Medicare.

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RECORDS

List all schools your child has attended and the dates s/he attended if available

Location of your child's birth certificate, social security card, and other important legal documents.

List your child's primary care doctor and contact information. Does this doctor have information about all other medical care and tests your child has had throughout his lifetime? If not, where is your child's complete medical history located, including all current specialists?

List all mental health counselors, psychiatrists, psychologists, or behavioral specialists your child has seen. Include contact information and approximate date of treatment.

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