

### CHECKLIST: Creating a Life Plan

		Yes/Done	Action Required	Not Needed
	<b>A Vision for Your Child's Life as an Adult</b>			
1	Have you created a vision for your child's best possible quality of life as an adult?			
2	Have you involved your child and considered his/her wishes?			
3	Have you assessed his/her personal skills and limitations for adult living?			
4	Is your child eligible for SSI, Medicaid, state services, or housing assistance?			
5	Can you create a better quality of life by providing private financial support?			
6	Is your child likely to outlive you and your spouse? For how long?			
	<b>A Written Long-Range Plan to Achieve the Life Vision</b>			
7	Have you identified key events and dates in the lives of parents and family?			
	Each parent's year of retirement			
	Each parent's age for receiving Social Security or other pension			
	Grandparent's care needs and their life expectations			
8	Have you identified key milestones in your child's life?			
	The year of aging out of school			
	Receiving SSI, Medicaid, and state disability services			
	College degree or certificate, vocational training, or job skills coaching			
	Moving out of the parents' home into a state or private residence			
9	Do you have a plan for the next major transition in your child's life?			
10	Do you have a contingency plan for the death or disability of either parent?			
11	What are the uncertainties in the plan, when and how will you address them?			
	<b>The Circles of Support</b>			
12	Have you identified the critical roles in the circles of support?			
13	Have you identified roles in each of the four circles?			
14	Have you developed a list of individuals to invite to join a circle?			
15	Can you describe the expectations and time commitment to those you invite?			
	<b>A Plan for Mentoring Life Skills and Achieving Independence</b>			
16	Are you teaching the life skills that empower a place in the community?			
17	Are the circles of support in place to sustain independence?			
	<b>The Letter of Intent</b>			
18	Have you prepared a personal narrative?			
	About your family			
	What you want others to know about your child			
	Vision for your child's quality of life			
	Summary of your child's life plan with steps to reach the vision			
	A week in the life of your child			
	What needs to be done immediately if something happens to you and your spouse			
19	Have you prepared a summary document of current and future arrangements?			

	Key people in child's life			
	Personal Information			
	Medical Information			
	Government assistance and services			
	Employment			
	Residential Environment			
	Parent's estate plan and legal documents			
	Parent's financial information			
	Child's financial information			
	Arrangements that need to be made in case of your death			
	Final arrangements for the child when he/she dies			
<b>20</b>	Are files organized with backup copies or protection from destruction?			
<b>21</b>	Have you reviewed letter of intent with those who will come after you?			
<b>22</b>	Do you review your letter annually and keep files current?			

**Checklist: Creating a Life Plan**, adapted from *The Complete Guide to Creating a Special Needs Life Plan: A Comprehensive Approach Integrating Life, Resource, Financial, and Legal Planning to Ensure a Brighter Future for a Person with a Disability* by Hal Wright, CFP.