

Parents of individuals with special needs shared the below resources in response to an email to several local distribution lists asking for resource sharing. Neither I nor the Therapeutic Recreation Unit of the Conejo Recreation and Park District have personal knowledge of, experience with, or affiliation with any of the below listed resources.

Sent: Monday, January 03, 2011

Subject: gathering special needs financial planning resources

To parents: In an effort to be thorough in the upcoming special needs care planning seminars to be offered, I'd like to compile a list of special needs financial planners and special needs trust attorneys to share with parents in attendance. If you have a contact name and phone number and wouldn't mind sharing it with other parents, could you please send it to my attention?

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Parent responses:

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Marla will come to you, she travels to meet with you in your home.

2006 — Present Law Offices of Marla Kraus

I decided to focus my practice on assisting families with children with disabilities in the area of special needs estate planning so that the parents can be satisfied that their child will continue to have a quality life once they are not able to provide it.

1999 — 2008 Executive Director -Special Needs Advocate for Parents

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Special Needs Financial Planners

Todd B. Daniel, LUTCF, CLTC

Financial Strategies

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Helen Kim Bass, ChFC®, CA Insurance License # OD07796
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<http://www.naela.com> - National Association of Elder Law Attorneys
for a list of attorneys who are knowledgeable with special needs trusts.

<http://www.wealthcounsel.com> - a consortium of estate planning
attorneys with a database that can be searched by state and by typing in
special needs.

Websites

<http://www.massmutual.com/specialcare> - provides general
information on planning for your special needs child including wills and
special needs trusts (search special needs trusts on the website's search
engine).

(websites continued, next page)

<http://www.ssa.gov/notices/supplemental-security-income> -- This
website has a wealth of information on SSI including an online program
called the Benefit Eligibility Screening Tool that determines if your child is
eligible for SSI.

<http://www.metlife.com> - MetLife provides general information on
planning for your special needs child including wills and special needs trusts
(search special needs trusts on the website's search engine).

<http://www.wachbrit.com> - Estate Planning Attorney Diedre Wachbrit provides more detail on the common issues involved with special needs planning and materials used in connection with a parent training seminar on special needs trusts.

<http://www.amgtrust.com> - American Guaranty & Trust Company has a sample special need trust agreement and sample memorandum on common issues to focus on when drafting a special needs trust.

<http://www.specialneedsplanning.com> - Special Needs Planning has articles on special needs financial planning and sample letters of intent.

Organizations

The Association for Retarded Citizens - This organization has articles and an excellent booklet called "The Arc's Future Planning Resources." This booklet may be obtained on line at <http://thearc.org>, by calling 301/565-3842 or writing with \$2 postage to The ARC, National Headquarters, 1010 Wayne Ave. Suite 650, Silver Spring, MD 20910.

National Information Center for Children and Youth with Disabilities (NICHCY) - This organization has great articles on special needs estate planning and a worksheet for costing out the total expenses of a person with a disability. Visit their website at <http://www.nichcy.org>. (search their publications for "estate planning" and find their great 20 page guide "Estate Planning ND18")

Trust Management-Pooled Trusts

<http://charitiespooledtrust.org/>

<http://www.fndfl.org/>-Family Network on Disabilities

<http://proxyparentfoundation.org/>

<http://www.sntf-sd.org/>- Special Needs Trust Foundation-San Diego

<http://www.securedfutures-snt.org/>