

FUTURE PLANNING: A GUIDE FOR FAMILIES

PART 5: FINANCING MY FUTURE ABOUT ME

Who is responsible for my finances?

- I am responsible for handling my money and finances
- I am responsible for handling my money and finances, but may need advice from others
- I am responsible for handling some of my finances, but need help to manage them
- I need someone to handle my finances

Financial Resource Name: _____

Type of Account:

- Bank Account
- Life Insurance Policy
- Stock/Bond
- Other (describe): _____

Person helping manage resources: _____ Phone: _____

Government Resources Received:

Supplementary Security Insurance Amount: _____ Frequency: _____

Social Security Disabled Adult Child Amount: _____ Frequency: _____

Social Security Disability Insurance Amount: _____ Frequency: _____

State Disability Benefits: Amount: _____ Frequency: _____

Veteran's Benefits: Amount: _____ Frequency: _____

Medicaid

Medicare

EBT Cash/Food Benefits Amount: _____ Frequency: _____

Employment Benefits Amount: _____ Frequency: _____

Other (describe): Amount: _____ Frequency: _____

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PART 5: FINANCING MY FUTURE ABOUT MY DISABILITY SERVICES

Services Used:

Medicaid Waiver Services Contact: _____ Phone: _____

School-Provided Services Contact: _____ Phone: _____

Private Services Contact: _____ Phone: _____

Other services (describe):
Contact: _____ Phone: _____

Am I on waiting list for services?

- Yes
- No

What is the status of the application? _____

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PART 5: FINANCING MY FUTURE ABOUT MY FINANCES

I have...

A trust

- Yes
- No

What type of trust is it?

- 1st party – funded with my money
- 3rd Party – funded with someone else’s money
- Pooled Trust Account
- Other (describe): _____

Trustee/Administrator: _____ Phone: _____

Back-up name: _____ Phone: _____

A representative payee?

- Yes
- No

Representative payee: _____ Phone: _____

Back-up name: _____ Phone: _____

A financial power of attorney? Yes No

Power of attorney: _____ Phone: _____

Back-up name: _____ Phone: _____

Additional information: _____
