

Letters of Intent for SNTs

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Why create a Letter of Intent

- Letters of intent are pivotal in future planning and are invaluable in administering a trust.
- A Letter of Intent ensures the trustee (and others!) knows the abilities, limitations, likes, dislikes, interests, routines, history, future, hopes and dreams of the beneficiary.
- A Letter of Intent provides those nuanced details not included in the legal documents.
- BUT a Letter of Intent is not a legally binding document.

What should be included

- Who is writing the Letter of Intent and for what purpose
- Personal Information about the Beneficiary
- Living Situation
 - Give details about both their current and future living plans
- Education



What should be included



- Family Information
 - Family Members who are or who are not in the life of the individual
 - What is important to your family, like traditions, holidays, birthdays or past times and how they are celebrated.
 - Best friends, close friends who are a regular part of the individual's life.



What should be included

- Legal Decisions
 - Is the individual is responsible for his/her own legal decisions
 - Does the individual have someone help him/her make decisions (Supported Decision Making or other support)
 - Powers of attorney
 - Beliefs around guardianship
 - The individual has a guardian(s) or may need a guardian



What should be included

- Financial Information
 - WHO IS PAYING FOR WHAT
 - Who is responsible for handling money and finances?
 - Bank Accounts, Property, Vehicle
- Professional Information
 - Who are the professionals who are in their loved ones lives?



What should be included

- Medical History
 - *This section may be extremely detailed, depending on the beneficiary's needs. Tailor this to the beneficiary's medical needs or experiences.*
- Diagnosis
- Insurance or other medical coverage
- Daily Medical or other assistance
 - Does the individual need assistance completing activities of daily living?
 - Does the individual need assistance with instrumental activities of daily living?



What should be included

- Medical History (cont.)
 - Other physical needs
 - Are there particular things we should know about the person's mobility, vision, hearing, speech or other physical needs?
 - Assistive Device or Technology
 - Mental Health
 - Therapies
 - Dental History
 - Nutrition & Fitness
 - Final Medical wishes



What should be included

- Likes and Dislikes
 - Places to visit
 - Vacation
 - Likes to spend time with Important Events or Special Dates
- What the individual does for fun
- Things they would like to do in the future



What should be included

- Routines
- Employment or Volunteerism
- Religion



What should be included

- Emergencies
 - Who to contact
 - How does the individual react? (Do they hate loud noises, bright lights, strobe/flashing lights, first responders?)
 - How can they be supported in an emergency
- Final Arrangements
 - What, if any funeral arrangements have been made?
 - If no arrangements have been made, what preferences are there?

Stories of Beneficiaries whose families wrote a Letter of Intent

*Letters of Intent are all as unique as the individual for whom
the special needs trust is created.*

Daniel

- Loves video games
- Lives with roommates with staff nearby 24/7
- Protective of his parents
- People pleaser
- Autism Spectrum Disorder
- Oppositional Defiant Disorder
- Takes things VERY LITERALLY
- “NO” is a trigger that causes anger
- Wants a time machine





Melinda

- Lives with best friend Samantha
- Hobbies include cooking, shopping and driving around
- Works at the ice cream shop.
- Bipolar Disorder
- Not consistent with medications
- Spends lots of money when having an episode



Jenny

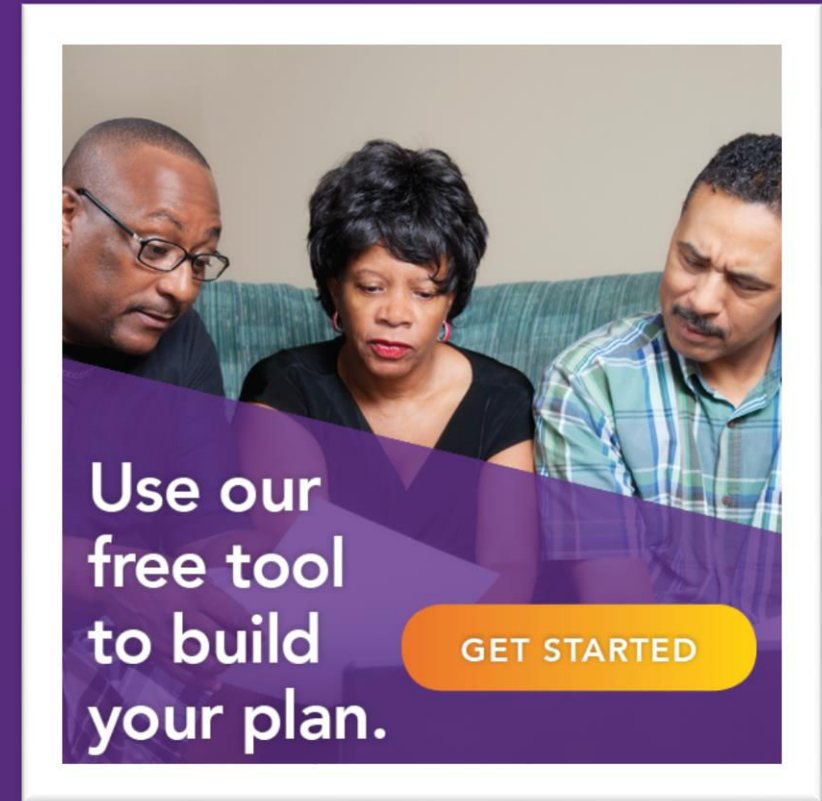
- Lives with her fiancé
- Loves being in love and planning weddings
- Has been married twice
- Diabetes
- Physical support needs



The Arc Center for Future Planning

The Arc US has some great resources for clients with IDD and their future planning.

<https://futureplanning.thearc.org>





Contact US at: 1-800-252-9729
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www.TheArcOfTexas.org/Trust

