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 administrating 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

Guardianship Alternatives:

Supported Decision-Making
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 US has some great resources for clients with IDD and their future planning.

https://futureplanning.thearc.org
Contact US at: 1-800-252-9729
trust@TheArcOfTexas.org
www.TheArcOfTexas.org/Trust