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.



- 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









• 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.





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





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• 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?







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?



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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





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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



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Employment or Volunteerism Routines Religion







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?

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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



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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 trust@TheArcOfTexas.org www.TheArcOfTexas.org/Trust





