



## Financial Planning for Special Needs – Beyond the Will and Trust

### Questions to Ask Yourself – If You Think You Are All Set!!!

1. **What is my vision of the legacy which I wish to leave my child?** This is very important! If you have any questions please feel free to fax this form to me...

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2. **Have I established proper Wills & Trusts** that transform my clear vision into an absolute future reality?

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3. **Does my Exexutor/trix or Guardian have a LETTER OF INTENT** which outlines my wishes for the future care of this person?

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4. **Will this Letter of Intent be passed to others** who may eventually care for my child, should s/he outlive my second caregiver?

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5. **Is the Trust endowed with enough money to assure** that distributions will not consume their principal throughout the beneficiary's lifetime?

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6. **Have I ensured that caregiving survivors are financially protected** from the future expenses in the care of my loved one with special needs?

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For more information, please call: Kirk S. Barth, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, LUCTF, CLTC, at Special Needs Hawaii... 808-469-4884 (Office) 808-258-3733 (Cell) 808-469-4899 (fax) [kbarth@jhnetwork.com](mailto:kbarth@jhnetwork.com) or visit my website: [www.specialneedshawaii.com](http://www.specialneedshawaii.com) .

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