SPECIAL NEEDS PLANNING WORKSHOP

ABOUT THE PRESENTER: Crystal Cartwright, is the mother of 5 amazing children, her oldest has autism. She is a part of your very own community and has served on many boards to advocate in the special needs community for the last 12 years. She became a professional following the same passions for families like hers. She believes that no family should be left behind.

WORKSHOP TOPICS:

• Self-assessment of current and ideal objectives for your family
• Government benefits
  o Medicaid
  o SSI vs. SSDI
  o Preserving Eligibility
• The Importance of Having a plan in Place
  o The Components of Putting together that plan
• Guardianship
  o The different types and how and when they function
  o What does the process look like?
• Letter of Intent / Last Wishes
• Special Needs Trust
  o Individual
  o Third Party
  o Pooled
• How to properly fund a Special Needs Trust and Protect Government benefits
  o Protecting benefits and providing for your child, when you aren’t able to
  o How to preserve trust remainder
  o Meet the Jones Family (See the before & After)

These workshops are FREE and apply to all families with special needs loved ones!

To RSVP contact Crystal A. Cartwright
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Loose Ends
Or...
LEGACY

Which One Will YOU Leave?