



Peace of Mind Portfolio

BROUGHT TO YOU BY:
Lifelong Networks for Communities of Support (LNCS)

	Pieces of Your Portfolio	In Place	Not Needed	Priority Item	Notes/Sources/Tasks
LEGAL PLANNING ITEMS	Awareness of the legal rights of your child in Arizona.				SAMPLE LINK: Awareness of the legal rights of your child in Arizona.
	Guardianship, conservatorship or Power of Attorney (POA) options for your child.				Resources and expertise needed to put in place
	Identify the scope and type of professional services needed for legal and financial planning.				Special Needs Trust (SNT) attorney and/or financial consultant
FINANCIAL PLANNING ITEMS	Comprehensive analysis and baseline of family member's financial needs.				Approximate 30-year planning horizon.
	Vehicles for securing the welfare and finances of your child.				Special Needs Trust (SNT); Achieving a Better Life Experience (ABLE) account
	Understanding of the extent and type of government services that will be needed.				Dept. of Developmental Disabilities (DDD); (AZ Long-Term Care System (ALTCS); AZ Health Care Cost Containment System (AHCCCS –Medicare / Medicaid); Social Security Income (SSI) / Social Security Disability Income (SSDI)
	Comprehensive financial plan developed for your adult child – including key financial instruments needed and distribution between personal government support required.				Special Needs Trust; ABLE account; others.

In Place – completed action **Not Needed** – Have alternative options.

Priority Item – Needs to be completed: 1) Top priority; 2) Another action needs to happen first; 3) Can be deferred for a while

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HEALTH & WELLNESS PLANNING ITEMS	Comprehensive medical and/or psychological evaluation available.				An immediate priority.
	Appropriate legal/medical protections in place.				Guardianship; conservatorship; POA; (living) wills; advanced directive; etc.
	Comprehensive written plan of your adult child's medical care and "day in the life" diary.				See Letter of Intent (LOI) format.
	Easily accessible and up to date medical records.				Template or app to facilitate; shareability.
COMMUNITY BUILDING PLANNING ITEMS	Transportation needs identified and a plan to put them in place.				Valley Metro; Light Rail; Dial A Ride
	Safety and security requirements addressed.				Low crime area; emergency services nearby; property security
	Access to: <ul style="list-style-type: none"> • Transportation • Retail shopping • Dining/restaurants • Medical • Employment/volunteer opportunities • Finance • Outdoor recreational/fitness • Lifelong education • Volunteer/places of worship opportunities 				Entertainment venues; socializing opportunities; etc.

****Build a Day in the Life / Week in the Life schedule demonstrating accessibility, engagement and enjoyment of community life.**

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