

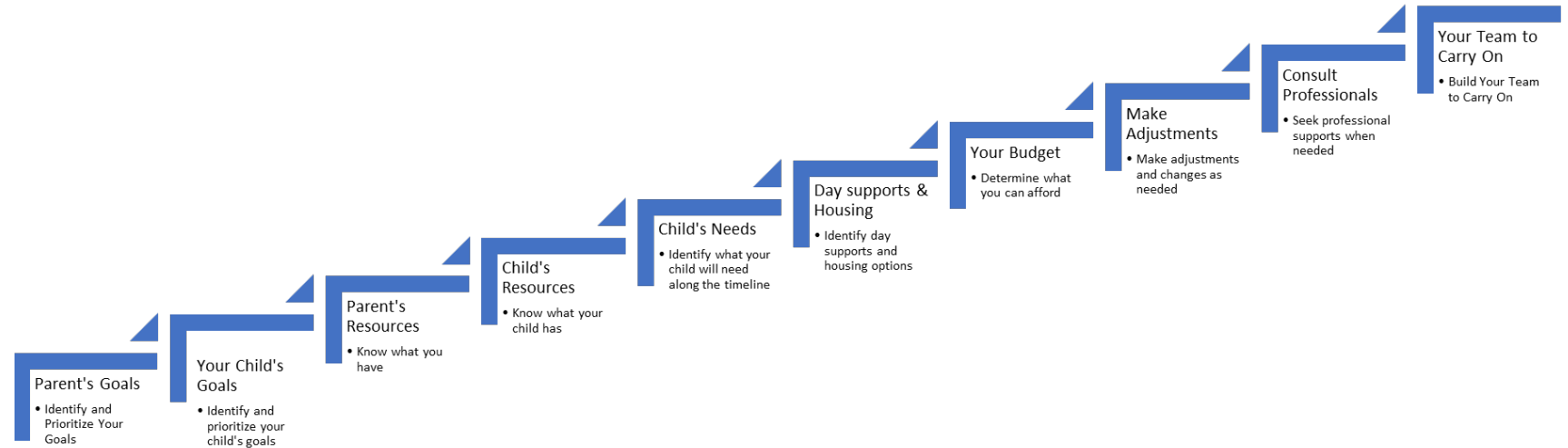


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The 10 Steps of Special Needs Planning

Excerpted from

The Special Needs Planning
Guide, Second Edition, 2021,
Haddad/Nadworny



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Step	Planning Action	Brief Description
1	Identify and prioritize Parent's Goals	General goals for yourself, your child with special needs and your other children. e.g. retirement
2	Identify and prioritize your child's goals.	Your vision of your child's future.
3	Know what you have.	Your personal balance sheet, income, expenses & estate assets/income.
4	Know what your child has.	Your child's assets, income & government benefits.
5	Identify your child's needs along the timeline.	What supports are needed and what different benefits, programs and housing options can provide them.
6	Identify day supports and housing option needs.	Identify your child's expenses and understand the costs associated with supports needed.
7	Determine what you can afford.	Pull together all the information you have gathered to make this determination.
8	Make changes or adjustments as needed.	Consider what is negotiable and non-negotiable for both your goals and your child's goals.
9	Seek professional supports when needed.	Consider hiring professionals to make things happen.
10	Build your team to carry on.	The family, friends and professionals who will step into your shoes.

For a details of how and what to do in each step, please see The Special Needs Planning Guide, Second Edition, Haddad/Nadworny.