

Creating an Estate Plan

The types of estate planning documents you'll create and people you'll need to work with in creating them are listed below. The order in which they are listed is a mere suggestion. The attorney you select to help you create the special needs trust will guide you through these steps.

Step	Documentation	People
Write a Letter of Intent	x	
Select a Special Needs Trust Attorney		x
Select a Trustee for the Special Needs Trust		x
Prepare a Special Needs Trust	x	
Select a Guardian		x
Prepare Guardianship Papers	x	
Prepare a Living Will	x	
Select a Trustee for Your Will		x
Prepare a Will	x	
Select a Power of Attorney		x
Prepare Durable Power of Attorney Papers (for financial decisions)	x	
Prepare a Health Care Proxy (for medical decisions; also known as "health care surrogate" or "durable medical power of attorney")	x	