

Special Needs Trust Planning Sheet

Question	Notes
Has anyone already left money in your child's name (inheritance, life insurance)?	
Do you have a will or estate plan that includes your child?	
Do you want to name a trustee (someone you trust to manage the money)?	
Will the trust be funded by you (3 rd party) or your child's own assets (1 st party)?	
Have you talked to an attorney who specializes in Special Needs Trusts?	
Do you need to set up a Pooled Trust instead (if no trusted family or friends)?	
Have you talked to family about NOT leaving money directly to your child?	
Where will you keep the trust documents, passwords, contact info., etc?	