

Special Needs Planning Worksheet

A Starting Point for Thoughtful Planning

This worksheet isn't about making final decisions.

It's about organizing your thoughts so planning feels less overwhelming.

Use it to reflect, jot notes, and identify questions you'd like guidance on.

1) Who Is This Planning For?

Name of loved one(s):

Age(s):

Brief description of their needs, supports, or circumstances (optional):

2) If You Couldn't Step In, What Matters Most?

When you think about someone else caring for your loved one, what feels most important to you?

- Familiar routines
- Emotional patience and understanding
- Advocacy in medical or educational settings
- Stability and consistency
- Maintaining independence where possible
- Cultural, religious, or family values
- Other: _____

3) Who Might Be Involved in Care or Advocacy?

List people you trust or would want involved in your loved one's care, advocacy, or decision-making. *(This is not a commitment—just a place to begin.)*

Name	Relationship	Strengths / Considerations
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4) Support Over Time

Do you expect your loved one's needs to change over time?

- Yes No Unsure

If yes or unsure, what changes do you anticipate, or what concerns do you have?

5) Daily Life or Personal Details to Keep in Mind

Are there routines, preferences, or details that would be helpful for someone else to know?



Questions or Situations You'd Like Guidance On:

What feels unclear, unresolved, or overwhelming right now?

Use this space to note questions you'd like help thinking through:

Financial or Benefit Considerations

You do **not** need to have answers here. This section simply helps identify areas where guidance may be helpful.

Check any that apply:

- Preserving public benefits
- Providing financial support without causing harm
- Coordinating care and resources
- Long-term planning for adulthood or aging caregivers
- Not sure where to begin
- Other: _____

Let's Take the Next Step Together

If this guide raised questions—or helped you clarify what's important—we invite you to connect when the time feels right.

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