

## Special Needs Planning Quiz!

- 1. Do you or your spouse/partner have a vision of how your dependent with a disability will live after you're gone?
- 2. Have you identified a guardian, conservator, or trustee for your dependent?
- 3. Do you have a complete understanding of Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) government benefits?
- 4. Have you begun setting aside money for your dependent?
- 5. Do you have a written Letter of Intent?
- 6. Are any dependents, whether they have a disability or not, being excluded in your will?
- 7. Do you have a special needs or supplementary needs trust established to preserve government benefits?
- 8. Have provisions been made to fund these trusts with assets or insurance?
- 9. Have you coordinated your special needs planning with other relatives?
- 10. Have you done everything possible to protect your dependent's financial future?
- 11. Have you planned where your dependent will live if you are not around?
- 12. Will your dependent be able to earn enough to care for himself or herself?
- 13. Will your dependent have adequate health insurance?

If you are not satisfied with all of your answers, please feel free to contact Special Needs Planner, Nancy Cuning, CFP®, at 317.574.2930 for a confidential consultation.

For more information about this and other related topics, visit the MetLife Center for Special Needs Planning<sup>SM</sup> website at [www.metlife.com/specialneeds](http://www.metlife.com/specialneeds) or call **1-877-638-3375**).