

# Annual planning checklist

## Update Letter of Intent

- Changes or additions to introduction
- New likes/dislikes
- Changes in medications and treatments
- New doctors or therapist & contact information
- Changes in contact information or status of family, friends, advocates
- New information about work or day program
- Financial changes
- Changes in plans or dreams for the future

## Check in with county Service Coordinator or Service & Support Administrator:

- Check status on residential waiting list
- Review intentions for placement

## Review financial status:

- Medicaid re-determination
- Report income to SSA if required
- Check for changes in employee sponsored benefits that may list child as beneficiary

## Review will for any needed changes (at least every five years or if..):

- Death of a family member
- Changes in economic situation
- Changes in tax law
- Changes in government programs

## Guardianship (if applicable):

- Probate review (every other year)
- Financial report for estate guardianships
- Report any changes in status (i.e. address) to the probate court