

## An Easy Ten Step Program to Create a Special Needs Estate Plan for Your Family

- 1.** Make an appointment for an intake meeting via extended phone call, video conference or in one of Fletcher Tilton's offices in Framingham, Hyannis or Worcester.
- 2.** Complete a Fletcher Tilton Special Needs Questionnaire.
- 3.** Attend the intake meeting with the completed questionnaire to review and discuss goals and objectives for your special needs estate plan.
- 4.** Receive a recommendation and fee agreement letter from the Chair of the FT Special Needs Practice Group containing recommendations and an estimate of the cost of completing a special needs estate plan for your family.
- 5.** Agree to hire the FT Special Needs Practice Group to complete your special needs estate plan.
- 6.** Receive a draft set of documents based on your family's goals and objectives.
- 7.** Confer with members of the FT Special Needs Practice Group about your estate planning documents so you gain an understanding of the meaning and intention of your family's special needs estate plan. These discussions can be done via extended phone calls, email communications, video conferences or in one of our offices in Framingham, Hyannis or Worcester.

- 8.** Execute all necessary documentation and work with members of the FT Special Needs Practice Group to re-allocate and re-title assets, as needed.
- 9.** Receive a complete binder containing all of the documentation contained in your special needs estate plan.
- 10.** Review your special needs estate plan every 3 to 5 years or as necessary if major life changes occur.

### RESPONSIVE SOLUTIONS

Two simple words that explain our commitment to you. Being responsive is a critical element in building a strong attorney-client relationship. Whether you are a new or existing client, we'll be quick to respond to your needs with the knowledge necessary to find solutions to your legal concerns.

### WE HAVE ANSWERS

To learn how we can assist, contact our Special Needs Practice Group Leader Frederick M. Misilo, Jr. at 508.459.8059 or [fmisilo@fletchertilton.com](mailto:fmisilo@fletchertilton.com).

Ask us about providing a seminar for groups of parents, professionals and advocates on special education issues.