



# COMPANY FACT SHEET

## History

In October 2003, Mary Anne Ehlert, certified financial planner, founded **Protected Tomorrows, Inc.** in suburban Chicago to honor her sister, Marcia Wallace. Marcia was born with developmental disabilities due to cerebral palsy.

One of the many things Ms. Ehlert learned from her sister was the importance of planning. Ms. Ehlert initially launched Ehlert Financial Group in 1990 to focus on special needs planning after recognizing her parents' concern for Marcia's future when they would no longer be there to care for her. Thirteen years later, Protected Tomorrows, Inc. was born. The idea was to provide a wide array of services all focused on enhancing the lives of families with members who have special needs. Ms. Ehlert started to share her knowledge and comprehensive planning process with professionals nationwide. The goals she developed for the new firm continue to this day. Those goals are as follows:

- Educate families about the importance of proper planning and provide effective planning tools.
- Identify transition resources, to find solutions for future residential needs.
- Build a network of Advocates for special needs individuals
- Spearhead legislative change for the improved lives of people with disabilities.

Today specially trained and licensed Advocates as well as independent financial advisors and other professionals work directly with special needs families as part of the Protected Tomorrows Network. The advocacy firm offers families online planning support as well as legislative activism and research. For more details, visit [www.protectedtomorrows.com](http://www.protectedtomorrows.com).

## Five Ways that the Protected Tomorrows Network Helps Families with Special Needs

### 1. By Working with Families Directly

Protected Tomorrows is driven to enhance the lives of individuals with special needs. We have developed a proprietary planning process that our specially trained professionals use when working with families. This eight-step method helps families build a viable Future Care Plan™ for their loved one with a disability. This system enables families to look at all aspects of life including legal, financial, residential, employment and recreational. We reach out to families with a wide range of developmental, cognitive or physical needs including: autism, Down's syndrome, cerebral palsy, muscular dystrophy, multiple sclerosis, Lou Gehrig's disease, Alzheimer's disease and mental illness. This consistent and comprehensive planning approach enables Protected Tomorrows to help families in a way that no other service is able to provide for the special needs community.



## **2. By Working with the Existing Advisors that Families Engage**

Protected Tomorrows has a considerable network of financial, legal, social, medical and other professionals that we work with to assist families with members who have special needs. We use a number of approaches to build this network including online systems and regular communications. Our track record shows that these professionals trust us because of the compassionate care we provide for their clients, the comprehensive service we deliver and the rigorous systems we employ that ensure these clients come back to the original professional to provide any products or services in which they specialize. Our goal is to help enhance the lives of families with special needs and we make that goal our priority.

## **3. By Training Professionals to Help Families as We Do**

Protected Tomorrows Advocates are trained and licensed to guide families with special needs through the same eight-step planning process that we created. Advocates receive initial training, ongoing coaching, and unlimited access to research, back-office support, marketing materials and annual license renewal sessions. Coast to coast, Protected Tomorrows Advocates are helping families work through the challenges they face with government benefits, housing, employment and more.

## **4. By Empowering Families to Help Themselves**

Protected Tomorrows has created the following tools to help empower families to help themselves:

- **PT Live!**
  - A Web-based search tool that connects families with different government agencies, doctors, caregivers and other services.
- **Online Future Care Planning System**
  - Families can access an online life-planning portal with steps to help them achieve their goals and plan for the future.
- **The Special Needs Network (TSNN)**
  - A 501(c) (3) not-for-profit organization that provides Internet access to information for special needs life planning. The Network Web site is designed as a resource where families can find answers about disability issues, learn how to work successfully with government agencies and access other resources. The Network is philanthropically funded and set up to also allow for a pooled trust offering to families. For more information, visit [www.tsnn.org](http://www.tsnn.org).

## **5. By Advocating for Change through Legislation and Community Activism**

Protected Tomorrows looks to solve residential, employment, recreation, and legal issues that the special needs community faces. It is embarking on the development of a national think-tank to serve as an impetus to community development, vocational services improvements and legislative change.