



Future Care Planning Series: Estate Planning Essentials

Dream Team Worksheet

Take the first step in building your loved one’s Dream Team by listing key players for each category.

Categories	Positions	Potential Team Members
Guardianship/Conservatorship: Estate, Person, or Both; Alternative POA		
Daily Living Support: Service Providers, Job Coach, Personal Assistant		

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Medical: Physicians, Therapists (OT and PT), Dieticians		
Social: Groups, Programs, Friendships, Social Interactions		
Faith: Support Groups, Weekly Services		

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Advocates: IEP Specialist, School Advocate, Ombudsman, Benefits Support		

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