

# Individual and Family Services

Protected Tomorrows offers a structured future planning approach built on compassion and expertise. We help individuals and families navigate complex challenges across government benefits, finance, legal, educational, vocational, residential, and social needs. You can work with Protected Tomorrows in three different ways, allowing us to provide support tailored specifically to your unique goals.

|  | Special Needs Planning Service | Compassionate Financial Advisory Service | Premier Comprehensive Service |
|--|--------------------------------|--|-------------------------------|
| Parent University Subscription                   | ✍                              | ✍  | ✍                             |
| Referral Network Access                          | ✍                              | ✍  | ✍                             |
| My Special Life Workbook                         | ✍                              | ✍  | ✍                             |
| Continued Advocacy and Support                   | ✍                              | ✍  | ✍                             |
| Special Needs Trust Education                    | ✍                              |  | ✍                             |
| Future Care Plan Design                          | ✍                              |  | ✍                             |
| Government Benefits Consultation                 | ✍                              |  | ✍                             |
| Medicare Transition Planning                     | ✍                              |  | ✍                             |
| Individual Education Plan (IEP) Consultation     | ✍                              |  | ✍                             |
| Vocational and Employment Consultation           | ✍                              |  | ✍                             |
| Recreational and Social Options Consultation     | ✍                              |  | ✍                             |
| Residential Options Consultation                 | ✍                              |  | ✍                             |
| Financial Plan Development                       |                                | ✍  | ✍                             |
| Wealth Management                                |                                | ✍  | ✍                             |
| Retirement Income Planning (Retiring for Three)  |                                | ✍  | ✍                             |
| Insurance Needs Analysis                         |                                | ✍  | ✍                             |
| Estate Plan and Special Needs Trust Coordination |                                | ✍  | ✍                             |
| Future Care Plan Execution                       |                                | ✍  | ✍                             |
| Tax Planning                                     |                                | ✍  | ✍                             |
| Roth Conversion Analysis                         |                                | ✍  | ✍                             |
| Charitable Giving Consultation                   |                                | ✍  | ✍                             |
| Protected Tomorrows Family Meeting               |                                | ✍  | ✍                             |

For more information about Protected Tomorrows please contact **847-522-8080** or visit [protectedtomorrows.com](https://protectedtomorrows.com)



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