

Protected Tomorrows is a compassionate advocacy and financial advisory organization dedicated to guiding families of individuals with special needs and disabilities. We provide education, support, and resources in the areas of government programs and benefits, financial, legal, and life planning, offering peace of mind through holistic, heart-centered counsel.

**Future Care • Funding • Government Benefits**  
**Legal Considerations • Residential Options**  
**Employment Opportunities • Recreational Choices**  
**Education Options • Family Communication**



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# Charting the Journey

## A Future Planning Checklist



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Compassionate planning to protect those with special needs.

# Charting the Journey | A Future Planning Checklist

## Birth to 2 Years Old

- ✍ Begin to document your child's life milestones
- ✍ Have your child evaluated, if not diagnosed at birth
- ✍ Contact your state's Early Intervention office to determine if your child qualifies for services
- ✍ Contact your local support group based on your child's diagnosis
- ✍ Update your insurance carrier and pediatrician information
- ✍ Share medical checklist from aap.org per your child's diagnosis

## 3 to 5 Years Old

- ✍ Enroll your child into an Early Childhood Special Education program at your school
- ✍ Develop your child's Individual Education Plan (IEP) with your school
- ✍ Research programs that would benefit your child
- ✍ Identify your school case worker or advocate

## 5 to 13 Years Old

- ✍ Evaluate educational placement type, self-contained vs. inclusion
- ✍ Work with your educational team to establish and fulfill your child's goals
- ✍ Ensure your child is receiving entitled therapies through their IEP
- ✍ Keep your child engaged outside of school
- ✍ Establish a Special Needs Trust with a qualified attorney and review future financial needs
- ✍ Update IEP annually and request mid-term review

## 14 Years Old

- ✍ Complete Transition questionnaire
- ✍ Explore your child's recreation and leisure interests
- ✍ Discuss medical needs and therapies
- ✍ Complete IEP Transition Plan
- ✍ Review Estate Planning documents and Special Needs Trust

## 15 Years Old

- ✍ Attend transition and career events for students with special needs
- ✍ Discuss SSI/Social Security benefits and support groups
- ✍ Contact your local Pre-Admission Screening (PAS) Agency to renew waitlist eligibility annually
- ✍ Explore residential options to learn about programs and waiting lists
- ✍ Discuss home services

## 16 Years Old

- ✍ Complete the Vocational Interest survey
- ✍ Explore supported employment through job coaching, career counseling, and job shadowing
- ✍ Obtain state identification or driver's license
- ✍ Explore transportation options
- ✍ Attend college or transition fairs and explore options

## 17 Years Old

- ✍ Discuss guardianship, power of attorney, and supported decision making
- ✍ Confirm expected graduation date
- ✍ Have a psychological or psycho-educational evaluation completed
- ✍ Research post-secondary training program
- ✍ Visit campuses and post-secondary training programs
- ✍ Discuss adult agency options with DRS and/or PAS agent
- ✍ Apply for free or reduced-fare card for transportation
- ✍ Review SSI and SSDI eligibility requirements
- ✍ Review financials

## 18 Years Old

- ✍ Apply for college or trade school post-secondary vocational services
- ✍ Apply for guardianship, this can be done independently or through a qualified attorney
- ✍ Apply for SSI and Medicaid
- ✍ Look into Medicaid-funded programming
- ✍ Contact an in-home or residential supported living case management agency for funding options
- ✍ Review Transition Plan and services

## 19 to 22 Years Old

- ✍ Identify and access recreation and leisure activities
- ✍ Participate in post-secondary vocational services and/or employment
- ✍ Encourage active participation with adult services
- ✍ Investigate and confirm day programs or workshops
- ✍ Review the Transition Plan and services

## Annually and Ongoing

- ✍ Review and discuss your child's needs, goals, and wants with family
- ✍ Review and update medical records
- ✍ Continue to document your child's life milestones
- ✍ Increase self-advocacy: independence and life skills