

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: <i>Estate, Person, or Both; Alternative POA</i>		
Daily Living Support: <i>Service Providers, Job Coach, Personal Assistant</i>		

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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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Home Support: <i>Home Maintenance, Cleaning Staff, Landscaping</i>		
Professionals: <i>CPA, Financial Advisor, Insurance Agents, Trust Company</i>		
Attorneys: <i>POA, Guardianship/Conservatorship, Special Needs Trust</i>		

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

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