

Top 10 Questions To Ask When Choosing Special Needs Professionals

Without the guidance of knowledgeable professionals, protecting your loved ones with special needs can be overwhelming. Here is a list of questions that will help you choose the best one.

1. What experience do you have in special needs planning? How many families have you helped? (This is a highly specialized area that requires knowledge of many complex areas. Experience is very important)
2. Can you provide me with the names of at least three people that you have helped with special needs planning?
3. How do you charge, and what are the fees for your services? (Be sure to get a firm cost before you begin working with any professionals. Avoid those that charge by the hour)
4. What is the maximum asset limit to qualify for Supplemental Security Income (SSI) and Medical Assistance (MA)?
5. What is a Letter of Intent and how should it be used in planning?
6. What personal experience do you have with individuals with special needs? (Professionals that have family members with special needs understand the unique challenges that arise)
7. Can you define the process you utilize to help ensure the quality of life for my loved one with special needs?
8. What is the difference between a Supplemental Needs Trust and a Special Needs Trust?
9. What is your involvement in the special needs community? (This includes non-profit organizations and volunteer work. It shows their level of commitment, support and understanding)
10. Who are the professionals you work with in special needs planning? (They should work with other experienced professionals)