



DOWN SYNDROME GUILD
OF DALLAS

LETTER OF INTENT

One of the greatest illusions in the estate planning field today is that the average family can guarantee a bright future for the person with a disability simply by preparing a will and a special needs trust.

The purpose of a *letter of intent* is to provide vital personal information and guidance to others who may provide care, support or other assistance for the person with a disability. Times change and it is impossible to foresee the future, so a general outline of your expectations, hopes and wishes are preferred to rigid requirements.

A letter of intent can take a variety of forms and does not have to meet the special requirements of a will or other legal documents. It is not legally binding. However, it can be coordinated with your will so that it clearly communicates information to the appropriate people, such as a personal representative, trustee, guardian or service provider that would help them make important decisions on behalf of the individual.

When you write your letter of intent, use plain language rather than technical language. You may want to ask your attorney to review your letter to make sure that it does not contradict your will in any way, and to make sure that it is thorough and easy to understand.

Some choose to make the drafting of the letter a group effort, including the person with a disability for whom the planning is being done, close relatives and friends.

A letter of intent should provide information about the person in the past and the present, and explain your and the person with a disability's expectations and preferences regarding his/her future in a variety of areas:

- Home environment
- Learning and education
- Employment
- Relationships and affiliations
- Health and well-being
- Unique information about your family member (what works and doesn't work- important things to know)
- Abilities and needs regarding things like communication, daily living and personal care, money management and decision-making
- Personal beliefs (religious, spiritual)
- Financial information (government benefits, bank accounts, trust, life insurance)

You should periodically review and update your letter of intent when significant changes occur. Some people review their letter of intent around the time of the person's birthday each year. Make certain that important people in your life either have a copy of your letter or know where to locate it.

For a detailed template and guide to writing your letter of intent, contact the Down Syndrome Guild office and request a copy of "The Life Planning Approach."