



**Life Planning for
Special Needs Children**
A Division of KFDE

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PART II

LAST WILL AND TESTAMENT AND SPECIAL NEEDS TRUST

Dear Parent(s) or Guardian,

At this point the team coordinator has reviewed the PART I of the questionnaire and explained in very general terms the basic concepts of wills, special needs trusts, advocacy, guardianship, etc.

The team coordinator will assist you with the completion of this Part II and has also reviewed your overall estate and financial plan, completed the worksheet for funding your special needs trusts and made preliminary recommendations.

The LPSNC attorney will contact you to review and finalize the decisions that you make in this PART II, and then legal documents will be prepared based upon your instructions.

Last Will and Testament

Item	Father	Mother
I would like the following person(s) to serve as the Executor or Personal Representative for my estate:		
First		
Second		
Third		
I estimate that my total state will be valued over \$1,000,000.		
If any taxes are due, I would like them paid before the inheritances are distributed.		
I would like to leave everything to my surviving spouse.		
I would like to give specific items to others. Please attach a list specifying item and the person who should receive it.		
If my spouse does not survive me, I would like to leave everything to:		
My children to be divided equally. If a child does not survive me, I want his/her share to be divided among his/her children or spouse.		
My children to be divided equally. If a child does not survive me, I want his/her share to be divided amongst his/her siblings.		
I would like to make a special gift to a charity or another organization.		
I want to leave the following to the Special Needs Trust.		
If any of your children under the age of 19 in Nebraska (18 in some other states) when both you and your spouse die, would you like to create a testamentary trust to manage their inheritance? (Yes/No)		
If you own your own business, do you wanted to continue? Who should inherit it?		

Trust Questionnaire

Item	
The name of the Special Needs Trust will be	
The Initial Trustees -- Grantors	
First	
Second	
We would like this financial institution or Master Trust program to serve as the successor trustee.	
Or the Successor Trustees should be	
First	
Second	
Third	
Fourth	
In the event that the above successor trustees do not outlive the person with the disability or are unable to serve for any reason, we would like the following organization(s) to either serve as successor trustee or assist in finding a suitable successor trustee.	<ol style="list-style-type: none"> 1. 2. 3.

Advocates, Guardians or Conservators

Item	Person(s) with Disability	Other Children
We do not want a legal Guardian or Conservator for the person with a disability.		*****
We recommend this Advocate or Advocacy Service for the person with a disability.		*****
We do want a legal Guardian or Conservator for the person with a disability.		We recommend the following for our children
In the event that the above guardians are conservators does not outlive the person with the disability or are unable to serve for any reason, we would like the following organization(s) to either serve as guardian or conservator or assist in finding suitable guardians or conservators.	<ol style="list-style-type: none"> 1. 2. 3. 	*****

Final Arrangements

Item	Father	Mother	Person(s) with a Disability
Do you wish to be cremated?			
If so, the ashes should be disbursed...			
Do you wish to be buried?			
Funeral Home			
Cemetery			
Service			
Prepaid/Insurance			
Military Benefits			
Other			

Trust Remainder

Item	Remainderman - Person or Organization	Percentage or Dollars
If the person with a disability dies before the last grantor dies, the trust fund should go to...		
If the person with a disability dies after their last grantor dies, the trust fund should go to...		
First		
Second		
Third		
If the trust must terminate for any reason other than the grantor or person with a disability dying, the remainder should go to...		
Do you wish to leave a gift to a charity or organization that you have worked with or that served the person with a disability?		
First		
Second		