



Living...Not Just Surviving

Tim Kolb, CEO & Executive Director
1202 O Street, Franklin, NE 68939-1227
Ph. (308) 425-3741/FAX (877) 276-4902
E-mail: KFDE@frontiernet.net



Life Planning for
Special Needs Children
A Division of KFDE

Ofc. Ph. 402-489-8616/Cell # 402-525-8034

Board of Directors

Steve Morris,
President

Jeffrey Krull,
Vice President

Karen Kolb,
Secretary/Treasurer

Susan Morris

Cindy Scott

KFDE Activities

Disability & Systems
Change Legislation

Special Needs Trust
Planning and Advisory
Services

Financial Planning for
Special Needs
Children

Disabilities & Life
Planning Consulting

Personal Assistance
Services (a.k.a. care
aide assistance)
Consulting

Life Outside of
Nursing Homes
Through Independent
Living Advocacy

Planning for Success
in Education &
Employment for
Students with
Disabilities

Consulting on
Marriage & Family
with Disabilities

Consulting on
Accessible &
Affordable Housing
Through Universal
Design

Assistive Technology
Resources Consulting

Consulting on the
Americans with
Disabilities Act
(ADA), and Section
504 of the
Rehabilitation Act

Consulting on Work
Incentives for
Persons with
Disabilities Seeking
Employment

Seminars and
Workshops on
Disability Subjects

Schedule of Services and Fees

SERVICE COMPREHENSIVE PLANNING FEES

<u>LIFE PLAN</u>	<u>Master</u>	<u>3rd Party</u>	<u>Self-Settled</u>
Standard	\$500-650	\$1,000	\$1,000-1,500
Modified	500-575	965	965-1,465
Special	500	915	915-1,415

SPECIAL NEEDS TRUST \$60 per hour subject to annual cap.
ADVISORY SERVICES

NOTE: All Comprehensive LIFE Plans include Life Planning Counseling, basic financial and trust fund analysis, and one Intervivos (Living) Special Needs Trust. The Standard Plan includes two Wills; the Modified Plan, one Will. Legal fees will be substantially less if Master/Community based “Special Needs Trust” is used. Conversely, if a “self settled” Special Needs Trust is needed, the legal fees may be greater since the courts will usually need to be petitioned.

Life Planning for Special Needs Children (LPSNC) contracts with local teams of skilled Certified Financial Planners and Attorneys to complete all of the professional financial planning, counseling and legal documents at one set fee. A down payment of one-half of the estimated fees is required to start the planning process with the balance due upon completion of the LIFE PLAN. Other payment arrangements must be approved in advance. Legal fees are billed separately by the LPSNC contracted attorney. The above rates are based upon in-office, or in-home consultations in Franklin, NE and/or Lincoln, NE. If the planner or attorney is required to travel more than 50 miles from their respective office, there may be a mileage charge up to \$50 per visit.