



Erin C. Eurenienus

Attorney at Law

Special Needs Planning Bingo

Name Guardians for your children	Created an Estate Plan for yourself	Looked into an insurance policy to fund a trust.	Created or updated your estate plan in the last 5 years	Talked to your family about preferred living situations for your loved one
Have written wishes for your loved one's care if you cannot provide the care	Do you understand what the term "deeming" means?	Put your loved one on a list for a Home Based and Community Services Waiver	Understand the role of the "Trustee" in a Trust	Set up an ABLE account for your loved one
Applied for Guardianship of your loved one	Joined a Support Group/Community to provide resources for you and your family	FREE SPACE	Connected with your local county board of developmental disabilities	Set up a Special Needs Trust (SNT) for your loved one
Had a discussion with family members about serving as Trustee	Understand what is meant by the term "in kind support and maintenance"	Have a written record of all doctor's visits and care providers	Know how a pooled trust operates	Calculated the Future Financial Needs of your loved one
Know the difference between Medicare and Medicaid	Understand the benefits of an SNT even if your loved one will never need public assistance	Funded your trust properly	Examined the Eligibility Criteria for SSI or SSDI	Made sure that your beneficiary designations on retirement accounts are correct

Need help getting a Bingo?

Call (440) 253-8800

www.westsideelderlaw.com