



Set Up a Trust... Now What?

ADVANCED SESSION

September 1

🕒 12:00 PM EST (11:00 AM CST | 10:00 AM MST | 9:00 AM PST)

Creating a special needs trust is one of the biggest pieces of a plan for a loved one with disabilities. But for a trust to work best, it requires significant planning around it.

We'll walk through the next steps that a family can take to make sure they are getting the most out of this important tool.

[Register Now](#)



Letter of Intent Workshop

LIVE INTERACTIVE SESSION – ALL PLANNING STAGES

September 15

🕒 12:00 PM EST (11:00 AM CST | 10:00 AM MST | 9:00 AM PST)

A Letter of Intent is one of the most valuable planning tools for families.

During this session, families will begin building a first draft of the document that communicates important information, routines, preferences, care needs, and family wishes.

[Register Now](#)



Where to Start: 4 Essential Steps

BEGINNER SESSION

September 29

🕒 12:00 PM EST (11:00 AM CST | 10:00 AM MST | 9:00 AM PST)

If you're new to special needs planning, this is the best place to begin.

We'll cover the four foundational planning areas every family should address before moving on to the more advanced areas of planning.

[Register Now](#)