

Letter of Intent

A Personal Guide for Your Child's Future Caregivers

This document is your opportunity to share the things about your child that no legal document can capture — their daily routines, their favorite things, what calms them, what makes them laugh, and how to help them thrive. It is one of the most important documents a parent can prepare.

A Letter of Intent is not a legal document, but it serves as a vital companion to your will, special needs trust, and guardianship designations. It gives future caregivers, trustees, and guardians the personal knowledge they need to provide the best possible care for your child.

Prepared for (Child's Name):

Date Prepared:

Prepared by (Parent/Guardian):

Relationship:

Review and update this document at least once a year, or whenever there is a significant change in your child's life, medical needs, or support services.

Store this document alongside your will, special needs trust, and other estate planning documents.

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Financial Planning for Special Needs Families

How to Use This Template

Work through each section at your own pace — you do not need to complete this in one sitting. Write in a conversational tone, as if you are explaining your child's world to someone who loves them but doesn't yet know the details. Be as specific as possible. The more information you provide, the smoother the transition will be for your child and their future caregivers.

Sections

1. Personal Information & Family History
2. Daily Living & Routines
3. Medical Information
4. Behavioral & Emotional Needs
5. Education & Employment
6. Social, Recreational & Religious Life
7. Living Arrangements
8. Government Benefits & Financial Information
9. Legal Documents & Key Contacts
10. Final Wishes & Personal Message

1. Personal Information & Family History

Start with the basics about your child and your family. This helps caregivers understand who your child is and the people who matter most in their life.

About Your Child

Full Legal Name:

Preferred Name / Nickname:

Date of Birth:

Social Security Number:

Blood Type:

Primary Language:

Current Address:

Diagnosis / Disability:

Brief Description of Your Child (personality, temperament, strengths):

Family Background

Parent(s) / Guardian(s) Names and Contact Information:

Siblings (names, ages, contact info, relationship with your child):

Other Important Family Members or Close Friends:

Family Pets (name, type, significance to your child):

Fond Memories or Family Stories Your Child Loves:

2. Daily Living & Routines

Routines provide comfort and stability. Be as specific as possible — the small details matter most. Describe what a typical day looks like from morning to bedtime.

Morning Routine

Wake-up time and morning process (what helps them start the day):

Personal Care & Hygiene

Bathing preferences and level of assistance needed:

Dressing (preferences, assistance needed, clothing likes/dislikes):

Grooming (hair, teeth, shaving — what works, what doesn't):

Toileting (level of independence, any specific needs):

Meals & Nutrition

Favorite foods and meals:

Foods to avoid (allergies, dislikes, texture sensitivities):

Eating habits and mealtime preferences (utensils, setting, timing):

Special dietary requirements or restrictions:

Evening & Bedtime Routine

Bedtime and evening routine (what helps them wind down and sleep):

Sleep habits, preferences, and any nighttime concerns:

3. Medical Information

Accurate medical information can be critical in an emergency. Include every provider, medication, and procedure — even the ones that seem routine to you.

Primary Care & Specialists

Primary Care Physician (name, practice, phone):

Dentist:

Specialists (list each with name, specialty, phone):

Preferred Hospital / Emergency Room:

Health Insurance Information (carrier, policy number):

Medications

List each medication, dosage, frequency, what it's for, prescribing doctor, and pharmacy.

Current Medications:

Allergies & Sensitivities

Drug allergies:

Food allergies:

Environmental/sensory sensitivities:

Therapies & Treatments

Current therapies (OT, PT, speech, ABA, counseling — provider, frequency):

Medical history, surgeries, or hospitalizations:

4. Behavioral & Emotional Needs

This section helps caregivers understand how your child experiences the world and what strategies work best for support.

Communication style (verbal, nonverbal, AAC device, sign language):

How your child expresses happiness, frustration, pain, or fear:

Common triggers for distress or meltdowns:

What calms your child (specific strategies, objects, phrases):

Behavioral support plans currently in place:

Things to avoid (specific situations, phrases, or approaches):

How your child shows affection and how they like to receive it:

5. Education & Employment

Whether your child is in school, a day program, or employed, describe their current situation and your vision for their continued learning and growth.

Current school, program, or employer (name, address, contact):

Grade level or program type:

IEP or 504 Plan details (if applicable):

Transportation to/from school or work:

Special accommodations or supports in place:

Your hopes for their educational or vocational future:

6. Social, Recreational & Religious Life

The things that bring joy and meaning to your child's life — friendships, hobbies, traditions — are just as important as medical and financial details.

Close friends (names, how they know each other, contact info):

Hobbies, interests, and favorite activities:

Sports, clubs, or community groups:

Favorite music, TV shows, movies, books, or games:

Religious or spiritual practices and community:

Holiday traditions and celebrations important to your child:

Vacation or travel preferences and any travel considerations:

7. Living Arrangements

Where and how your child lives is one of the most important decisions a future caregiver will face. Share your preferences and reasoning.

Current living situation:

Your preferred living arrangement if you can no longer provide care:

Preferred caregiver(s) or guardian(s) — and why:

People who should NOT be caregivers — and why:

Safety considerations in the home:

Level of supervision needed (constant, periodic, independent with check-ins):

Residential programs or group homes you have researched or prefer:

8. Government Benefits & Financial Information

This section helps trustees and guardians maintain your child's benefit eligibility and understand how their care is currently funded.

Government Benefits

SSI / SSDI (amount, payment schedule, representative payee):

Medicaid (state, managed care plan, ID number):

Medicare (if applicable):

Medicaid Waiver Services (type of waiver, services received):

ABLE Account (if applicable — custodian, institution, account number):

Other benefits (housing assistance, food stamps, respite care, etc.):

Financial Information

Special Needs Trust (trustee, institution, purpose):

Other trusts or savings designated for your child:

Life insurance policies funding your child's care (carrier, policy number, beneficiary):

Monthly expenses for your child's care (estimate):

9. Legal Documents & Key Contacts

List where important documents are stored and who should be contacted in the event of an emergency or transition of care.

Document Locations

Will / Revocable Trust:

Special Needs Trust:

Guardianship / Conservatorship Documents:

Power of Attorney / Healthcare Proxy:

Insurance Policies:

Birth Certificate, ID, Passport:

Key Contacts

List the people and professionals who should be contacted for each area of your child's life.

Role	Name	Phone / Email
Attorney		
Trustee		

Guardian		
Financial Advisor		
Insurance Agent		
Case Manager / Social Worker		
Advocacy Organization		
Emergency Contact 1		
Emergency Contact 2		
Other		

10. Final Wishes & Personal Message

This is the most personal section of the Letter of Intent. Share your hopes, dreams, and anything else you want future caregivers to know about your child.

Your vision for your child's future — where they live, what their days look like:

What you most want caregivers to understand about your child:

Your hopes and dreams for your child:

A personal message to your child (optional):

A personal message to your child's future caregiver (optional):

Signature:

Date:

Signature (Second Parent/Guardian, if applicable):

Date:

This Letter of Intent template is provided by Special Legacy as an educational resource. It is not a legal document. Consult with a qualified attorney to ensure your estate plan is complete and your child's future is fully protected.

Have questions about planning for your child's future? Visit speciallegacy.com to schedule a consultation.