

Must be on approved letterhead

Date

Name
Address
City, State Zip

Dear Client,

Undoubtedly, as parents of children of special needs, the greatest concern that you face is what will happen to your child when you are no longer able to care for him or her because of your own aging and health issues or, most critically, your own deaths.

You daily face decisions that are both difficult and crucial to the wellbeing of both your child and the other members of your family. In making those decisions, you must exercise patience, empathy, understanding and commitment to a much greater degree than other parents.

On top of that, you are acutely aware that not doing any planning is not an option for either you or for your child. This is an extremely complex area of the law so failure to plan, and plan properly, can result in the loss of valuable state and Federal funding for your child's care.

In addition, the funding that is available from government sources is not meant to be enough to provide the level of care and comfort you desire for your child. Supplemental resources are often needed. Those resources must be provided in such a manner that will not cause the loss of government benefits and, at the same time, will also be protected against claims by those same provider agencies or perhaps other creditors.

I will contact you in the next few days to see how I may assist you. And, while I cannot provide legal or tax advice, I will work with your tax and legal advisors to help make sure that your financial assets are structured to meet your needs and the needs of your child.

Sincerely,

Financial Service Professional Name