

Special Needs Roadmap



Current Summary

Describe here what your loved one is doing today, just share a little bit about them:

Describe your loved one's strengths and needs:

Strengths	Areas of Need



Goals

List your financial, legal, and advocacy goals here:

Goals:

Financial Goals	Legal Goals	Advocacy Goals

↘ Your Next Steps

Describe the action steps you need to take to address your goals:

Immediate Steps	Short and Long Term Steps
What resources are needed?	What resources are needed?

↘ Executing and Monitoring

Describe the activities in place or upcoming that will help you implement and monitor your Special Needs Roadmap

Activities	Status	Completion Date

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Important Contacts

Name and Role	Email	Phone Number

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Attachments

- Financial Plan
- Care Plan

- Estate Plan
- Other supporting documents