



Current Supports and Services

This worksheet is focused on capturing your loved one's current supports and services. The reason to do that is to help uncover what might still be needed, missing, or unidentified. Before you move into the financial planning side of this course, identifying and uncovering support needs can help guide your special needs planning efforts by identifying the cost of needed services OR where public benefits and services might help to fill unmet needs. So let's get started! Take a minute now to identify the supports and services you have, need, and those that maybe you don't know about yet (which means they might be opportunities).

Service/ Support	Have	N/A	Need	Check here if you don't know what this is
IEP				
IEP Advocate or Advocacy Agency helping you with schooling				
Medicaid Waiver				
Social and Recreational Activities (such as going to Special Olympics or a local non profit agency)				



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Service/ Support	Have	N/A	Need	Check here if you don't know what this is
Social Security Benefits				
In-Home Services (such as a paid caregiver coming into the home to assist your loved one)				
Community Based Services (such as a paid professional or paid caregiver assisting your loved one to participate in community activities or any activities outside of the home)				



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Service/ Support	Have	N/A	Need	Check here if you don't know what this is
Residential Supports (such as group home services, supported living, or sponsored residential services)				
Respite (a paid caregiver coming into your home to care for your loved one so that you can rest or leave your home for an activity)				
Sibling Help (supports designed for your loved one's siblings)				