



# SPECIAL NEEDS ASSESSMENT

## UNDERSTANDING SPECIAL NEEDS CARE AND QUALITY OF LIFE CONSIDERATIONS

As a trustee, fiduciary, or guardian for an individual with special medical needs, it is important to fully understand their unique care and quality of life needs to properly administer special needs trusts, supplemental needs trusts and other discretionary accounts. Your role as financial advisor does not stop at managing investments and processing expenditure disbursements. There are important considerations and risks that must be understood to properly fulfill your duties as a trusted advisor for a client with special needs. National Care Advisors is here to help!

Many clients with special medical needs have complex medical care and quality life needs that are further complicated by public benefits availability, family challenges and an uncertain future. To assist trusted advisors and their clients navigate these concerns, our team of Special Needs Nurse Consultants can complete a Special Needs Assessment to:

1. Assess care needs and quality of life requirements as specified by the client, family and/or legal representative (Trustee, Guardian, Parent, etc.)
2. Document the current comprehensive care situation, including current services, equipment and vendors to meet those goals
3. Analyze the current utilization and project the future availability of all third-party payer sources that the Client is eligible to receive
4. Project all resources required to supplement third party payer sources to meet the quality of life objectives and goals as specified by the Trustee, client or family
5. Provide recommendations and support regarding care needs and quality of life administration of controlled accounts such as Special Needs Trusts, Guardianships or other financial matters relative to the long-term interests of the Client

This formal, written report will document the unique care and quality of life considerations that are important to the individual, while also providing a road map to maximize their future quality of life. Our Consultants have extensive experience both assessing clients with special needs and helping to implement long term, sustainable solutions to help clients realize significant gains in quality of life. Our assessments and recommendations are grounded in real world, practical experience assisting thousands of clients nationwide.



Planning for care. For life.

**Do you have a new client with special medical needs?** Is a current client or family member experiencing challenges in their care and quality of life? Contact National Care Advisors today to discuss how our team of Special Needs Nurse Consultants can help you assess your client's unique needs!