Welcome to Future Care Planning Services
How Comprehensive Planning Helps Identify Respite Options

Presented by:

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Future Care Planning Services: The Mission

Future Care Planning Services provides comprehensive life care planning that promotes peace of mind for caregivers/care partners and their loved ones with disabilities, by offering choices in key areas including financial, medical, legal, residential and other important services.
Future Care Planning: Service Menu

Planning Services: Since 2001

Trust Services: Since 2009
Community Pooled Trust (SNT’s). We offer three Trust options:
  Funded by the individual with a disability:
    1. First Party Medicaid Spend down Trust
    2. First Party Lump Sum Trust
  Funded by people other than the individual:
    3. Third Party Trusts

Golisano Life Enhancement Fund: Since 2014
Meet Our Team:

Bertha Porter, Customer Relations Specialist

Shan Donoghue, Transition Specialist

Ginny Lyness, Guardianship Specialist

Margaret Lonnen, Guardianship Specialist

Jennifer Helmbold, Program Director

Evelyn Exman, Planning Specialist

Marie Cancela, Trust Client Account Coordinator
Who do we serve?

- Individuals with disabilities and their caregivers/care partners
- Age 18 and older
- Residents of Monroe and surrounding counties
- Families interested in planning and/or 17A Guardianship, help with SNT’s, SSI, spenddown issues.
Planning is bringing the future into the present so that you can do something about it now.

Alan Lakein
Why is Planning Important?

- Identifies values and priorities
- Communicates to others
- Helps gain insight/knowledge
- Gives us the ability to avoid problems
- Provides clarity
- Provides peace of mind
- Reduces stress
The Future Care 4-Step Process

1. Initial Meeting and Enrollment
2. Letter of Intent Interview
3. Intake-Planning meeting
   Planning Specialist reviews current benefits
   Guardianship work begins with Specialist
4. Plan Presentation

These meetings are usually a month or so apart and there is a “secret” Step 5…
FCPS 4-Step Planning

Family Enters

Ensure Future is Secure - i.e. Wills

Benefits options

Guardianship

*Respite Options

*SNT Options

Options
Initial Meeting and Enrollment

(1st Meeting)

A Future Care Planning team member meets with a family and explains our process and answers questions. If the family decides to continue, we complete enrollment paperwork, arrange payment and possible reimbursement, and set up the next appointment.
Letter of Intent

(2nd Meeting)

The Letter of Intent is a family’s voice; a tool or a “legacy document,” used to summarize the vast knowledge of an individual, their unique needs, and their family’s plans, hopes, and dreams for them, in a way that it can be easily accessed and/or shared with future caregivers/care partners.
Letter of Intent
Covers key areas such as:

- Demographics
- Family Info and Valued Relationships
- Education and Work Info
- Health Overview, Medications, List of Doctors
- Food Preferences/Diet
- Religious Preferences
- Cultural Values and Traditions
- Leisure Activities
- Transportation
- Day Programming
- ADL’s: Areas of Independence vs. Needed Support
- Current Daily Routine
- Current Benefits
- Financial Overview
- Wishes for the Future
Intake- Planning Meeting
(3rd Meeting)

• Family meets Planning Specialist to review the current situation
• Family meets Guardianship Specialist to begin this process, as applicable
9 Components of each Future Care Plan:

- Benefits - SSI - SSD - DAC
- Supplemental Needs Trusts
- Legal Documents
- Guardianship
- Housing Options
- Transportation
- Employment
- Social/Recreational Opportunities
- Burial Planning
Who? A person who meets the statutory definition of intellectual disability, developmental disability, or has suffered a Traumatic Brain Injury (TBI), may be determined in need of a 17-A Guardianship.

Why? Guardianship is primarily used for:
- Health Care Decision Making
- Advocacy

What? Guardianship is a legal process. It is a serious matter and should be considered carefully. When 17-A Guardianship does not seem appropriate, other options can be explored.
Plan Presentation
(4th Meeting)

- Family meets with Planning Specialist to review Individualized Plan
- Receives binder with written, comprehensive plan
- Guardianship process continues
Future Care Planning Services: 2-year follow up
(Top Secret Step 5)

Follow up calls at
3, 6, 12, 18, 24 months

Aimed to help families follow through on planning goals over time

Future Care Planning Services has had 98-100% satisfaction rates for the last 5 years!
“Caring for a loved one with a disability can be overwhelming if you aren’t prepared or don’t have support.”
Don’t FEAR the future! PLAN for it!
Resources

Websites:

www.futurecareplanning.org

www.archrespite.org/respitelocator

www.nycourts.gov/forms/surrogates/guardianship.shtml

www.opwdd.ny.gov

Books:

*Thicker than Water*: Edited by Don Meyer, Woodbine House, 2009