M&L Special Needs Planning, LLC understand that your time is valuable, especially when caring for an individual with special needs. We provide a series of seminars to better provide you with all the information you need.

The parents can attend the program that suits their situation and be introduced to other advisors that can help them. The seminars will focus on the components of a complete special needs life plan.

"We'd still be "in the weeds" if you hadn't helped us with education, resources, contacts and real-life scenarios that motivated and strengthened us..."

Amy H. Moorer, CFRE,
Director of Advancement Community Clinic, Inc.

"... your Financial Assessment Planning Program is an essential tool and critical asset for parents, like us, working and financially struggling to help our children succeed with their diverse special needs and the general family..."

Bill Vucci

"Thank you for performing a comprehensive special needs financial planning and insurance review of our family finances. We are a long way ahead to becoming prepared financially as our son David transitions out of high school. One of the big benefits has been to reduce the stress on David's sibling about what will happen in the future."

Raymond & Aileen Horn

"...you have made such a difference! Because we both knew you from within the community of parents of children with developmental disabilities, my son's mother and I felt we could trust that you understood us. We could tell that your highest goal was the current and future well-being of our son."

Jim Regan

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Passion to guide. The knowledge and experience to succeed.

M&L SPECIAL NEEDS PLANNING

Seminars & Workshops

Ellie Carney at Discovery Cove

M&L Special Needs Planning, LLC is focused on serving families with individual(s) that have special needs.

We provide presentations to help plan a stable financial future and a quality life.

Navigating the Financial World of the Special Family

This workshop examines the Unique Process of Providing and Planning for the Family with Special Needs. It is a detailed overview of what it means to be a family with special needs, the journey, and how completing a comprehensive special need financial life plan will enable the family to be proactive in planning for the entire family's financial future.

We discuss the special needs financial planning timeline and the difference between traditional vs. special needs planning. We address the basics of what needs to be considered now and when the parents are gone – legal & estate issues, guardianship, Special Needs Trust, funding the Special Needs Trust and the Letter of Intent. There is a concentrated concern on Lifetime Planning for the individual with special needs.

The intention of this workshop is to help families understand and effectively deal with their unique challenges and achieve their financial goals to provide for the current and future costs for the individual with special needs.

Understanding SSI/Medicaid and SSDI/Medicare

Government benefits such as SSI/Medicaid & SSDI/Medicare are complicated and time consuming to understand. We will discuss in detail what the government benefits and the types of programs are, their importance, when and how to apply, how to qualify and how much money the individual with special needs would possibly receive. We also discuss what factors move an individual from SSI to SSDI and why, and what affects this has on the Medicaid and/or Medicare. We briefly discuss works incentives for both SSI and SSDI. Work incentives are the safety nets which allows one to work and keep your government benefits and/or insurance.

Estate Planning for the Special Needs Family

M&L together with a special needs attorney discuss the key elements of estate planning for the family with special needs. There will be an explanation of the necessary estate planning documents such as wills, trusts, powers of attorneys, living wills, HIPPA, etc with a description of the specifics of special needs estate planning – guardianship, special needs trusts, government benefits, funding options and more. Leaving this workshop you will have a clear understanding on what needs to be done on the legal side of special needs planning.

"As the mother of a special needs child and a Certified Financial Planner (CFP®), I have a unique perspective on the lifelong challenges of planning for the economic security and quality of life for my entire family."

Maedi Tanham Carney, CFP®
Founder

Other Workshops Available

We have more workshops that cover material concerning: Transitioning Planning and Discussion of Post Secondary Options, Preparing Letter of Intent for your Special Needs Child, and Overview of Residential Options and How to Plan Financially.

Speaking Engagements

M&L Special Needs Planning holds their workshop series at, support groups, schools and anywhere else one of our seminars is requested. We are happy to travel and if you would like us to speak at your location we will be honored to share any of our workshops with your group.

Contact Us

Because of these challenges, we believe it is best to have a series of seminars rather than one, all inclusive program. This allows the parents to get information gradually. They will learn to navigate the financial and legal maze of planning for the individual with special needs to ensure the quality of life for the long term and after the parents are gone.

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