

## **LETTER OF INTENT**

*A letter of intent is a key part of effective future planning. It familiarizes other people with the person with a disability and expresses your expectations and wishes for his or her life.*



## LETTER OF INTENT

The purpose of a *letter of intent* is to provide guidance to others who may provide care, support or other assistance for the person with a disability. Times change and it is impossible to foresee the future, so a general outline of your expectations, hopes and wishes are preferred to rigid requirements.

A letter of intent can take a variety of forms and does not have to meet the special requirements of a will or other legal documents. It is not legally binding. However, it should be coordinated with your will so that it clearly communicates information to the appropriate people, such as a personal representative, trustee, guardian or service provider who would help them make important decisions on behalf of the individual.

When you write your letter of intent, use plain language rather than technical language. You may ask your attorney to review your letter to make sure that it does not contradict your will in any way and to make sure that it is thorough and easy to understand.

It is a good idea to make the drafting of a letter of intent a group effort, including the person with a disability for whom the planning is being done, close relatives and friends.

A letter of intent should describe the person now and explain your and the person with a disability's expectations and preferences regarding his or her future in a variety of areas:

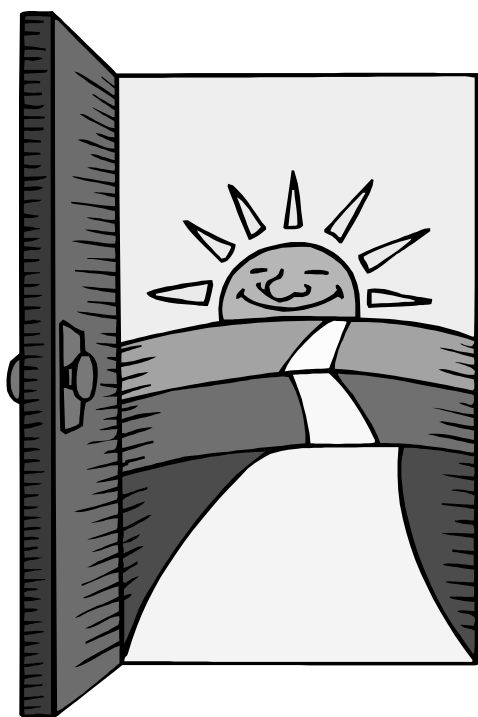
- Home environment
- Learning and education
- Employment
- Relationships and affiliations
- Health and well-being
- Unique information about your family member (what works and doesn't work, important things to know)
- Abilities and needs regarding things like communication,
- Independence in daily living and personal care, money management and decision-making
- Personal beliefs (religious, spiritual)
- Financial information (government benefits, bank accounts, trust, life insurance)

The information you cover and the degree of detail you provide in your letter will depend upon the person's ability to clearly communicate his or her own wishes, likes and dislikes.

You should periodically review and update your letter of intent when significant changes occur. Some people review their letter of intent around the time of the person's birthday each year. Make certain that important people in your life either have a copy of your letter or know where to locate it.

Throughout the life planning section of this *Guide*, questions have been included for each life domain and other critical concerns. These may be directly included in your letter of intent or you may summarize them. There is no right or wrong way to write the letter but be sure you include enough detail so people who are unfamiliar with you and the person will be able to see the vision you have for the future and the important information needed to make that vision a reality!

There are several ways for you to format your letter of intent. Using the information you have developed in this volume of the *Guide*, you may write a “free flowing” letter of intent. In using this method, your document will read like a letter, similar to the example provided on the next page.



*A letter of intent is a roadmap to the future...*

March 22, 2000

Letter of Intent for Mark Phillip Smith

SS#: 555-55-5555

DOB: 5-17—86

Dear family and friends,

We write this letter to convey our hopes and wishes for our son, Mark Philip Smith's, future. We hope that the information we have provided will help the people and organizations who assist Mark to know him better and to support him to be as fulfilled, happy and independent as possible.

We see Mark living in a home that he rents, rather than a home owned or rented by a service provider. He should be capable of this with the right support. Mark needs occasional reminders to thoroughly complete his personal self-care and household chores. Mark helps with meals and is becoming more independent with the use of picture cards for the recipes. Although he doesn't fully understand all money concepts, he can purchase what he wants independently in stores. We see Mark with a bank account when he becomes an adult with assistance to manage it.

We see Mark working in a job in the community rather than in a workshop and he has expressed this as his preference. It is too early to know what type of work Mark will choose, but he will require assistance to locate a job and likely ongoing support. Our hope is that the agency that supports him on the job will work to increase Mark's independence in the workplace and identify co-workers to provide support as much as possible.

We believe social life is as important as work. Mark likes to be with others. However, he usually needs assistance to find friends and plan activities, although we are working with him to be more independent because this is something that is important to him. Mark's preferences and wishes may change over time, and we ask those of you involved with him to take the time to truly determine what he is interested in. Some of his current interests include swimming, movies, sports and hanging out with his brothers doing just about anything.

Our hope is that Mark can live close enough to his brothers, Randy and Gary, to visit regularly. We hope Randy and Gary remain involved as much as possible, even as their lives get busy. Other important people to maintain relationships with are Mark's aunt Dottie and uncle Gordon, cousin Stacie, his friends Brandon and Jesse Frederick, and Sandy Warner who is a close family friend.

Mark has mental retardation and epilepsy. His seizures are well controlled and he typically goes several weeks without a seizure.....

Your letter of intent also may be a form letter. The questions provided in the Life Planning section of this *Guide* may be attached to the introductory information section provided on the next page. These forms, when combined, will provide a thorough picture of the person with a disability and will communicate your vision and wishes for his or her future.

**A complete form letter of intent should include:**

1. Letter of Intent (introductory information)
2. Home Questions
3. Health and Well-Being Questions
4. Learning and Education Questions
5. Employment Questions
6. Relationships and Affiliations Questions
7. Other information you feel should be included



*Don't forget to include other individuals close to the person in these discussions. They may prove to be a valuable source of information!*