

**Date:** [Date]

**To:** The Trustees of the [Name of Special Needs Trust] and the Proposed Successor Guardian

**Re: Letter of Intent for Successor Guardianship of [Beneficiary Name]**

Dear All,

This letter serves as a formal statement of my intent and wishes regarding the future care and guardianship of my [Son/Daughter/Relative], [Beneficiary Name], who is the primary beneficiary of the [Name of Special Needs Trust].

### **1. Appointment of Successor Guardian**

In the event of my death or incapacity, it is my wish that [Successor Guardian Name] be appointed as the legal guardian for [Beneficiary Name]. I have selected this individual because of their close relationship with [Beneficiary Name] and their understanding of [his/her] unique needs.

### **2. Care and Living Arrangements**

It is my preference that [Beneficiary Name] continues to live in [Current Residence/Type of Setting]. I request that the Successor Guardian and the Trustee work together to ensure that the environment remains safe, stable, and social.

### **3. Medical and Health Needs**

[Beneficiary Name] has the following conditions: [List Conditions]. [He/She] is currently under the care of [Doctor Name]. It is vital that [he/she] continues [his/her] medication schedule and therapy routines as outlined in the attached medical summary.

### **4. Daily Routine and Personal Preferences**

[Beneficiary Name] thrives on routine. [He/She] enjoys [Activities/Hobbies] and dislikes [Aversions]. Please ensure that [his/her] daily life includes opportunities for community integration and recreation.

### **5. Financial Coordination with the Trust**

I direct the Successor Guardian to maintain regular communication with the Trustee of the [Name of Special Needs Trust] to ensure that funds are distributed for the "supplemental care" of [Beneficiary Name] without jeopardizing government benefits (SSI/Medicaid).

### **6. Final Wishes**

My primary goal is to ensure that [Beneficiary Name] lives a life of dignity, comfort, and happiness. I trust [Successor Guardian Name] to make decisions in [Beneficiary Name]'s best interest, reflecting the values and care I have provided.

Sincerely,

[Your Signature]

[Your Printed Name]  
[Your Contact Information]

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**Acknowledgment of Successor Guardian:**

I, [Successor Guardian Name], have read this Letter of Intent and understand the wishes expressed herein regarding the care of [Beneficiary Name].

Signature: \_\_\_\_\_ Date: \_\_\_\_\_