FOUR LEAF

FINANCIAL PLANNING

Special Needs Planning and Consulting Services

As a Chartered Special Needs Consultant, I have the knowledge and experience in working with parent(s)/families who are caring for an individual with special needs who may require a financial supplement provided by you for each of your lifetimes.

Our Special Needs Planning and Consulting services will help you navigate what can be a complicated journey to ensuring your loved one has the resources needed. We will provide you with the education, connections, and advice you need to make informed decisions along the way.

You don't know what you don't know.

Our Tool Box

- Life Stage Education
- Government Benefits
- Earned and Unearned Income
- 529 ABLE Savings Account
- Estate Planning*
- Financial Management
- Supplemental Needs Analysis
- Non-Legal Future Planning
- Introduction to Resources for Special Needs
- Family/Caregiver/Trustee/Successor Guardian Education
- Expert Collaborations (CPA, Attorney, Case Managers, Non-Profits, etc.)

**Four Leaf Financial Planning does not provide legal services. We do not create estate planning documents to include Wills, Trust, Powers of Attorney, etc.*