

R I V K I N & R I V K I N , L L C
E S T A T E P L A N N I N G A T T O R N E Y S

Pro Bono Supplemental Needs Planning Program
Initial Eligibility Limitations

Thank you for your interest in our Pro Bono Supplemental Needs Planning Program. Although we wish the program could serve every family with a child that has special needs, in order to meet the program's mission and serve many families throughout the year with the program's available resources, we have established a number of initial eligibility limitations.

Specifically, the program is designed for individuals and couples who:

- Are Illinois residents and U.S. citizens
- Have a child residing in Illinois (and expected to continue residing in Illinois) with a disability that is expected to last 12 months or longer and that likely will prevent the child from being self-supporting
- Have a current household net worth of under \$1,000,000
- Have annual household gross income of under \$150,000
- Are not seeking counsel regarding the ownership of real estate outside of Illinois
- Do not have existing funded trusts (*i.e.*, trusts that currently hold assets) for their benefit or the benefit of their spouse or child with special needs
- Do not have existing wills or powers of attorney that they wish to keep in effect
- Are comfortable with an estate plan that leaves an equal inheritance to each of their children, with the one available alternative being a double share for a child with special needs
- For married couples:
 - a) Are comfortable naming each other to make medical and financial decisions in the case of disability or death
 - b) Are comfortable leaving all assets to the survivor of them at the first death
 - c) Do not have children from a prior relationship, unless both spouses opt to leave an equal inheritance to each child from any relationship, with the option of a double share to the child with special needs as noted above
 - d) Are not undergoing divorce proceedings or contemplating divorce
- Are otherwise comfortable with limited document choices

Please be aware that these are initial eligibility limitations. If you meet these initial limitations, attend the presentation, and subsequently submit a completed planning questionnaire, we still might determine that you are not eligible to participate in the simplified planning portion of the program due to some complexity in your situation or planning choices. In such a case, we do hope that you find the presentation to be helpful.

If we are not able to serve you in the program, we still encourage you to address your estate and supplemental needs planning outside of the program with us or another law firm.