MARYLAND FINANCIAL ADVOCATES
PLANNING FOR YOUR FAMILY'S SPECIAL NEEDS

Your Custom Special Needs Plan™ Protecting Tomorrows For Your Special Needs Child

PHASE 1

FAMILY DISCOVERY & REVIEW

The process starts with a meeting to capture your personal and financial goals, identify areas of concern, and highlight obstacles and opportunities. We clarify and document how you measure success, how we will best work together, and insure we build a Special Needs Timeline & Strategic Blueprint™ that best suits your families core personal and financial needs.

01

PHASE 2

THE STRATEGIC SPECIAL NEEDS TIMELINE & BLUEPRINT™

Once your goals have been established and financial documents collected, we will present an overview of our financial assessment. The Strategic Special Needs Timeline & Blueprint™ outlines the financial focus areas we will address, benefits that may be available to you and how we will manage specific deliverables and timelines throughout the process. We also identify your child's specific timeline pressure points so you know what ages to pay special attention to.

02

PHASE 3

PERSONAL PLANNING VISION - CONNECTING THE DOTS

We work together regarding your unique personal and financial goals. We discuss your vision for the future, your current situation and how we strive to achieve that vision through various focus areas including Investments and Income planning, Estate planning, Tax planning, & Insurance and Protection planning.

03

PHASE 4

SOLUTIONS AND STRATEGIES ACTIVATOR

Having completed the focused planning components, we move into the implementation phase of your Strategic Special Needs Timeline & Blueprint™ to start working towards your Personal Planning Vision. Collaborating with your other advisors as needed (attorney, CPA, etc.), we activate the planning strategies in a timely and efficient manner. Think of this phase as "pulling the levers" to get your plan started.

04

PHASE 5

THE CUSTOM PLAN INSPECTION

We meet regularly to reflect, review, and discuss your plans. To best serve you and your family, the planning process provides dynamic and relevant financial strategies that evolve with your changing needs and goals.

- Annual schedule of events
  Regular reviews of all financial vehicles
- Legacy Plan review (if applicable)
- Vaulting of important documents
- Benefits planning update and review
- Strategy adjustments & alignment
- Share the experience

05

FAMILY AND SUPPORT FOCUS
Identifying who can help with the various challenges of raising a special needs child.

EMOTIONAL FOCUS
Managing feelings of frustration, fear, uncertainty, anxiety, and being overwhelmed.

FINANCIAL FOCUS
Planning for basic savings and protection needs and goals while balancing todays and tomorrows.

LEGAL FOCUS
Having certain legal documents and understanding the basics is a top priority for planning.

GOVERNMENT BENEFITS FOCUS
Navigating the maze of benefits and eligibility along with how various State and Federal programs work.

The Custom Special Needs Plan™ may work for you if you:

- Want a professional partner focused on helping you make ongoing decisions about planning for your special needs child and family.
- Value ongoing service and advice to help maintain focus on your family's planning goals.
- Want to delegate the management of some/all of your financial planning opportunities.
- Are focused on results and outcomes over a period of time.
- Appreciate a strategic planning process designed to work with you and your family for many years to come.

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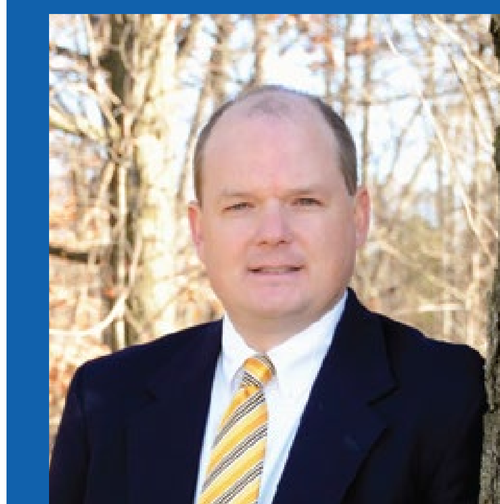

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"Taking the time to create your Custom Special Needs Plan™ may provide more clarity and confidence for your family's future"