

Beneficiary Asset Protection Plan

Date: [Insert Date]

To: [Insert Recipient Name]

Address: [Insert Recipient Address]

Dear [Insert Recipient Name],

I am writing to outline the details of the Beneficiary Asset Protection Plan for [Insert Name of Individual with Special Needs], who will be the primary beneficiary of this plan. This letter aims to ensure that [his/her/their] financial needs are met while preserving [his/her/their] eligibility for government benefits.

Overview of the Beneficiary

Name: [Insert Name]

Age: [Insert Age]

Disability: [Insert Disability or Condition]

Plan Details

The following strategies will be employed to protect the assets and ensure the long-term financial security of [Insert Name]:

- **Special Needs Trust:** Establish a Special Needs Trust to manage assets and provide for needs without jeopardizing government benefits.
- **Life Insurance Policies:** Consider life insurance to fund the trust upon my passing.
- **Account Management:** Appoint a trustee who understands the special needs community and can manage funds appropriately.

Funding Sources

The assets that may be included in this plan are as follows:

- **Cash Savings:** [Insert Amount]
- **Investment Accounts:** [Insert Details]
- **Real Estate:** [Insert Details]

Future Considerations

It is important to regularly review this plan and make adjustments as necessary, particularly in response to changes in [Insert Name]'s circumstances or legislation affecting special needs planning.

Thank you for your attention to this vital matter. Please feel free to reach out to discuss the specifics of this plan at your earliest convenience.

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email]