Dealing with Special Needs Clients and Dependents in Family Law Cases

1:00 p.m.-2:00 p.m.

Presented by
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Des Moines, IA 50309
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Polk County Courthouse
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Friday, October 25, 2013
Handle with Care

LIFE CARE PLAN
Important Disclosure

The information provided is not written or intended as tax or legal advice and may not be relied on for such purposes. Connect the Dots 4 Life, its employees and representatives are not authorized to give tax or legal advice. Individuals are encouraged to seek advice from their own tax or legal counsel. Individuals involved in the estate planning process should work with an estate planning team, including their own personal legal and/or tax counsel.
To the world, you may be one person, but to one person you may be the world.

- Heather Cortez, Poet
Labor of Love

- A Life-Long Commitment-and Beyond
- General Population Living Longer
- Special Needs Children Living Longer
- Think and Plan

The life expectancy of Down syndrome children has increased from 25 years in 1983 to about 60 years today.

http://www.cdadc.com/ds/downsyndromelifeexpectancy.htm
Address

- Physically
- Emotionally
- Financially

...once you are gone?
Steps to Take

- Same Estate Planning Steps That Parents Usually Take in Divorce

- Plus, Additional Steps Unique to Planning for a Special Needs Child
General Estate Planning Steps

- Will
- General durable power of attorney for financial affairs
- Durable power of attorney for health care
Steps Unique to Special Needs

- Drafting a Letter of Intent
- Ensuring Guardianship
- Financial Security

Tip – A letter of intent should be updated on a regular basis. Recommend to your client to select one day a year to review the letter of intent and make any needed changes.
FINANCIAL SECURITY
Disabled adults who may qualify for both Medicaid and Supplemental Security Income, may not receive these government benefits if their assets exceed $2,000.

A strategy: Place assets (including inheritance, gifts, life insurance, etc.) in a carefully drafted trust.

Distributions from a Special Needs Trust will not jeopardize a beneficiary’s eligibility for needs-based government assistance such as Medicaid and Supplemental Security Income (SSI), if properly established and administered within a certain trust arrangement.
Establish Special Needs Trust

- Coordinate available resources
- Ensure continuation of government benefits
- Provide supplemental needs for life
- Improve quality of life / Maintain standard of living
- Direct final distributions
Two Types of Government Benefits

1. Pension / Insurance type: Benefits based on contribution into the program, not based on a person’s financial need
   - Social Security Disability Insurance (SSDI)*
   - Medicare**

2. Needs Based type: Determine eligibility on disabled person’s monthly countable income and resources
   - Supplemental Security Income (SSI)***
   - Medicaid****

For information about SSDI go to http://ssa.gov/pgm/links_disability.htm. Information is available by telephone, mail, in person at an office. The toll-free number is 1-800-772-1213

**Contact the Social Security Administration at Medicare enrollment and eligibility at 800-772-1213 or www.medicare.gov.

***For information about SSI go to http://www.ssa.gov/ssi. Information is available by telephone, mail or in person at an office. The toll-free number is 1-800-772-1213.

****For more information regarding benefits provided by Medicare or Medicaid (Medi-CAL in California), visit www.cms.hhs.gov. Medicaid guidelines vary by state. Contact your local Medicaid office for details
Sources
Government Benefits
- Social Security
- Medicaid
- Medicare

Basic Needs
- Room and Board
- Basic Personal Needs
- Care and Supervision

Employment/Activities

Medical Care

Sources
Special Needs
- Trust

Medical/Dental Care excluded from social benefits
- Gifts on Special Occasions
- Professional Fees

Vacations & Trips
- Basic care if social benefits are cutback
- Personal Hygiene/Grooming Costs
Understand how the financial needs of the individual and how the social, medical and legal needs impact their life.

- Attention to details
- Coordinate strategies
- Offer options that make the most sense based on individual needs
- Ensure that benefits such as Medicaid* or Supplemental Security Income** won't unintentionally be jeopardized
- One word
- Focus on accommodating the parent/caregiver to maintain the lifestyle of the special needs individual

* For more information regarding benefits provided by Medicare or Medicaid (Medi-CAL in California), visit [www.cms.hhs.gov](http://www.cms.hhs.gov). Medicaid guidelines vary by state. Contact your local Medicaid office for details.
Most Importantly

- **WORK WITH A FINANCIAL PROFESSIONAL** that specializes in working with individuals with disabilities and/or special needs!

- No one professional can provide everything a family needs. An integrated team needs to be made up of, an attorney, a CPA, and others, such as social workers and caregivers, and a financial professional who specializes in working with special needs, all working together is the best way to serve the individual.

- Make sure the professionals you choose work with a qualified, experienced and involved in the area of special needs.
Dennis Burns
Founder and CEO
Connect the Dots 4 Life
Phone: 515-371-6768
Email: dburns@connectthedots4life.com

*Dennis Burns, a Registered Investment Advisor, offers securities and investment advisory services through AXA Advisors, LLC (NY, NY 212-314-4600), member FINRA/SIPC, and is an agent who offers annuity and insurance products through AXA Network, LLC and/or its insurance agency subsidiaries. Connect the Dots 4 Life is not owned or operated by AXA Advisors or AXA Network.*
Vocational Resources Plus LLC delivers unique offerings to address complex employment related and health related issues on legal cases in the areas of personal injury, disability, workers’ compensation, and family law by consulting with diverse clientele. Clientele include: individuals and families, attorneys, physicians, healthcare providers, insurance adjusters, educators, human resource representatives, state and federal agencies, community service providers, and associated professionals to positively direct a case.

Amy E. Botkin is the owner of Vocational Resources Plus LLC. The company formed in 1999 and offers professional services focusing on *Rehabilitation Counseling* and **Life Care Planning**.

Amy, an Iowa State University (1995) and Drake University alum (2004) is a Certified Rehabilitation Counselor, a Certified Job Placement Specialist, and a Certified Life Care Planner. Amy has expertise in rehabilitation counseling, vocational rehabilitation, life care planning, independent living needs assessments, comprehensive job placement, job development, job seeking skills training, community health education, occupational health, social security disability hearings and consumer support brokering. Amy is also skilled at serving as an expert witness.

*REHABILITATION COUNSELING*

It can be complex to describe exactly what a rehabilitation counselor does, so to simplify its definition I borrowed from Wikipedia: Rehabilitation Counseling is focused on helping people who have disabilities achieve their personal, career, and independent living goals through a counseling process. That’s what Amy loves to do!

Vocational Resources Plus LLC helps direct workers’ compensation, personal injury, disability, and civil cases by providing consultation, qualitative research services and reporting, as well as direct service provision. Consultation is helpful to determine what services are needed on the file. Research is based on a wide range of criteria and utilizes solid methodology and fact gathering techniques. Objective reporting details up-to-date information to define and enhance the direction of the case. Assignments vary greatly, and can include differences in age, education, skills, abilities, aptitudes, socio-economic factors, physical limitations and an assortment of employability factors.

A valuable service Amy provides is Vocational Assessment and Evaluation. This service helps to determine whether an individual could return-to-work, and if so, at what. It accurately assesses vocational potential for a variety of realistic employment and training options within a short time period while answering questions regarding capacity to achieve success. Here’s a sample for informational purposes only outlining what a report may look like:

Vocational Resources Plus LLC
P.O. Box 16005 • Des Moines, Iowa  50316  
Phone (515) 282-7753 • eFax (914) 265-8709 • VocResources@msn.com

VOCATIONAL ASSESSMENT & EVALUATION REPORT - SAMPLE
INDIVIDUAL’S NAME
DATE
INTRODUCTION: A vocational evaluation is an integral component in vocational rehabilitation. It sets the foundation for future services. An evaluation begins by interviewing the individual and gathering relevant work-life background information. Sources of information arise from personal contacts, vocational worksheets, review of case file information, behavioral observation, and vocational consulting expertise.

The assessment process includes identifying the evaluatee’s vocational strengths, employment interests, skills/aptitudes, behaviors, and general readiness for work. Research is performed and data is analyzed to evaluate whether or not the individual could return-to-work, and if so, at what. The outcome of the evaluation is detailed to provide direction toward appropriate occupational placement. Areas of concern or need and other pertinent vocational-related factors are presented to support future placement services.

CASE ACTIVITIES: Describes preliminary actions regarding the case and chronology of activity.

INITIAL VOCATIONAL INTERVIEW: Details on the date, place, and time of the meeting are presented. The individual’s presentation, personality traits, appearance, communication style, along with pertinent information in regards to pre-meeting communications and documentation submittal is reported. The information that follows in this section will basically be a transcript of questions asked and information shared during the initial interview.

BACKGROUND: Describes family matters, vocational issues, and an abbreviated life background.

EDUCATIONAL AND VOCATIONAL HISTORY: Educational and vocational historical details are qualitatively listed. The individual’s current status including recent employment periods are detailed. Positions held with specific employers, length of employment, duties performed, and other details on the individual’s educational and vocational history are succinctly described. Information is also reported from the individual’s completed generic application. Historical information about the individual’s learning capabilities, strengths and weaknesses in academic areas, and working environments is brought to light.

EMPLOYER INFORMATION/VOCATIONAL TRAINING: If the individual recently separated from an employer, or is currently employed, detailed information on the most recent job description, responsibilities, accountabilities, training, and work performed is identified. First-hand accounts of the employer’s hiring practices and needs are described. Additional analysis on vocational training, college coursework, and employment-related data is supplemented as needed.

VOCATIONAL SKILLS ASSESSMENT: The individual’s knowledge base, good worker skills, functional skills, and technical skills, along with abilities, aptitudes and other vocational skills and indicators are appraised. In addition, accomplishments, volunteer work, avocational activities and hobbies bring additional skills to light.

TRANSFERABLE SKILLS ANALYSIS (TSA): Transferable skills are the accomplishments and understandings an individual has acquired through jobs, school work, projects, parenting, hobbies, sports, volunteer work, avocational pursuits and leisure activities that can be used in many other situations. Transferable skills can be divided into three subsets: working with people; working with things; and working with information and data. Transferable skills are critically analyzed and are cross transferred to numerous occupations. A bulleted list of skills and qualifications are highlighted. This section is incredibly important and is useful when preparing target resumes.

VOLUNTEER BACKGROUND: A volunteer background is extremely advantageous when searching for a job. It tells prospective employers that you care about other areas of life and are engaged in your community.
HOBBIES OR AVOCATIONAL ACTIVITIES: Hobbies, interests or pastimes, either current or from the past, reveal insight into your interests are or what makes you enthusiastic outside of work. The activities are undertaken for pleasure or relaxation, during one’s leisure time.

WORKER CHARACTERISTICS: The individual’s worker characteristics are scaled and reported. Worker characteristics are the knowledge, skills and/or abilities necessary for the minimum acceptable performance of any job duty (often relative to a position description). Results of self-appraisal and worksheet responses are delineated. In addition, the concepts of employability, hireability and placeability are discussed.

EMPLOYABILITY: In simple categorical terms, employability is about being capable of getting and keeping fulfilling work. The individual’s employability is discussed in detail. Temperament, personality, attitude, motivational clues, and other employability characteristics are listed.

HIREABILITY: “Hireability” is a way of describing the likelihood that an individual may get hired for a job they are physically and psychologically capable of performing. The individual’s presentation is critiqued, job searching skills are assessed and other issues are discussed relative to the potential to attain employment.

PLACEABILITY: “Placeability” is partly about how in-demand the individual’s skills are and how well she or he can interview. The concept of being placed in the workforce is described in direct relationship between the individual and the professional counselor’s experience in the field of placement.

WORK AND CHARACTER REFERENCES: It is very important for a job seeker to have reliable work and character references. References often provide what employers are looking to find out about a job candidate. Employers look to find information on how someone previously performed on the job. Employers are also interested in learning about positive personal and professional qualities and attributes of a good worker and/or member of society.

HEALTH AND PHYSICAL CONDITIONS: The individual’s current health and physical conditions are documented based on the interviewee’s subjectivity, response to questions, the interviewer’s observations, and rehabilitation counseling methods. Implications and outcomes regarding the individuals: Quality of Life, Activities of Daily Living, Locus of Control, Substance Abuse or Addiction, Smoking, Alcohol, Nutrition, Exercise, and General Health along with Medication Management, Sleep Issues, Mental Health, and Alternative Therapies are discussed. Physician findings and other professional healthcare providers or therapist comments are briefed.

FUNCTIONAL IMPAIRMENT/PHYSICAL AND/OR PSYCHOLOGICAL LIMITATIONS: Functional limitations and beliefs of restrictions are documented on the interviewee’s subjectivity, responses to questions, the interviewer’s observations and rehabilitation counseling methods. Functional Capacity Evaluation results are explained. To explain impairment or limitation in lay person terms, comments from providers are offered.

PSYCHO-SOCIO-ECONOMIC FACTORS: The individual’s current socio-economic factors are documented. Vehicle, residence, income, investments and other assets are listed. Current or past legal issues are addressed. The individual’s sphere of influence and support system are identified. Values and social position relative to others is described from the individual’s point of view.

WORKER STYLE PREFERENCES, VOCATIONAL INTERESTS AND PLANNING IDEAS: The individual’s worker style preferences and vocational interests are identified. Work values and ethics are addressed. Based upon the individual’s skills and experiences, aptitudes and natural talents, ideas relative to occupations, career choices and various work environments are presented. In the event the individual has already considered future work, that information is described and methods and procedures to plan and prepare for the goal are delineated.
Specific support services are described. What employers seek in applicants becomes matched with what is established within the individual. Results of any career assessment or other testing instrument are revealed. Vocational planning ideas are presented.

**PERTINENT INFORMATION OR CONCERNS:** Concerns regarding vocational self-concept, an assessment of general readiness to return to work, and the individual’s perspective of the process of return to work are established. An assessment is performed based on the individual’s perception of work tasks and physical limitations. Any other concerns are presented, especially regarding the individual’s level of understanding of the placement process.

The individual’s job seeking abilities and level of job seeking performance is assessed. Areas of disinterest, weakness, challenge, obstacle, limitation, restriction, and threat are analyzed. Any issue regarding motivation, accommodation, and other factors or aspects relative to return to work that may interact with the placement process is made. An impression of the need for vocational guidance and job seeking skills training is offered.

Detail on the individual’s knowledge of how to access employment opportunities in the labor market is made. Specific examples of concern are presented. For example, when discussing positions, such as a file clerk, dietary aid, restaurant crew worker, security guard, etc., or in performing light duty jobs at [a specific Employer Name] that the individual excludes based on what he or she believes cannot physically be performed are detailed. The individual’s predisposition and attitude towards work, along with any self-imposed limitations are described.

**IMPRESSION/RESOURCES:** A professional opinion in regards to the individual’s capacity to pursue an effective job search campaign is offered. Additionally, a statement regarding the individual’s employment outlook is made. Transferable skills and worker characteristics are matched with occupations that are in demand within the individual’s labor market.

Local resources, research activities, and referrals to lead the individual to a number of avenues to explore options, gather first-hand information, and gain experience regarding the world of work are provided. Notation that the average job seeker would take full advantage of readily available job seeking resources to help with a successful transition to suitable employment based on individualized decision making and informed choice is highlighted.

**RECOMMENDATIONS:** Based on the evaluator’s understanding of the individual’s goals, vocational counseling services and placement programs may be recommended to include potential timeframes and outcomes. Additional vocational analysis and specific referrals to assist the individual in any area of need is made available.

**CONCLUSION:** Conclusions on the bottom line of the individual’s potential for successful employment are presented. Wage and occupational statistical information is referenced if applicable. Approval or recommendations for specific future services (example: comprehensive placement services) are pre-scheduled for initiation, or authorization is requested.

Sincerely,

Amy E. Botkin
Amy E. Botkin, MS, CRC, CLCP
Certified Rehabilitation Counselor / Certified Life Care Planner
Enclosures are submitted when they add value to the bottom line
PRESS RELEASE:

VOCATIONAL RESOURCES PLUS ANNOUNCES LIFE CARE PLANNING SERVICES

DES MOINES, IA – Wednesday October 26, 2011 – Vocational Resources Plus, LLC is launching a new service to help families and other organizations plan for long term health care needs by matching necessary care with the costs of providing that care.

The service, which produces an individual “Life Care Plan,” creates a guide to care that families can use to answer questions regarding future medical care and costs associated with an individual's life-long healthcare needs.

And families aren’t the only ones to benefit from care planning that matches needs with costs. Insurance companies, law firms and others also need to know what care is necessary, and how much it will cost.

“With all the changes we are experiencing in healthcare service delivery, life care planning benefits individuals and companies involved in decision-making” says Vocational Resources Plus owner Amy Botkin. “We all want the most and the best, but there are costs attached to everything a patient needs.”

“For example, litigated claims, when being addressed by a jury, need accurate information about care and costs to help in determining fair and equitable claims, payments and settlements.”

Botkin, a Certified Rehabilitation Counselor and Drake graduate, has partnered with Sharon Hamilton, RN, CNLP, to add Life Care Planning to the range of services already available through Vocational Resources Plus. Hamilton, a Certified Nurse Life Care Planner, sees another benefit.

“Life Care Planning services incorporate vocational rehabilitation into the care planning process. With Amy's expertise in job placement, combined with trends in assistive technology, we are well equipped to return the person to gainful employment with an accountable cost structure. This helps the bottom line.”

Botkin has been providing vocational consultative services to the insurance and legal industry since 1999. Hamilton, a Registered Nurse, has more than 20 years experience in home care case management, including eight years focusing on persons with disabilities.

The life care planning process draws on three areas of practice: Worker Compensation, Personal Injury and Long Term Disability. Vocational Resources Plus, LLC consults with people who want help to address the intricacies of insurance claims in these areas.

###

For more information, please contact Amy E. Botkin at 515-282-7753 [http://www.linkedin.com/in/amybotkin](http://www.linkedin.com/in/amybotkin)

[www.lcpresourcesplus.com](http://www.lcpresourcesplus.com)

Vocational Resources Plus, owned by Amy E. Botkin, identified the need for services in Des Moines, a major insurance center with nearly 60 life, health, and casualty companies.
Another valued service Amy provides is **Life Care Planning**. Life Care Planning is performed by highly qualified and certified health care professionals called into action when individuals and families experience disability. A planner does this by preparing a Life Care Plan - a carefully constructed document that will assure the individual receives quality healthcare services now and in the future, and associated costs are met.

**What is a Life Care Plan?** A life care plan is a dynamic document based upon published standards of practice, comprehensive assessment, data analysis, and research, which provides an organized, concise plan for current and future needs, with associated costs, for individuals who have experienced catastrophic injury or have chronic health care needs. (IALCP - International Academy of Life Care Planners, 2003. Definition established during the 2000 Life Care Planning Summit.)

The life care planning process draws on three areas of practice: Worker Compensation, Personal Injury and Long Term Disability. Life Care Planning Resources, Plus LLC in partnership with Vocational Resources Plus, LLC consults with people who want help to address the intricacies of claims in these and other areas.

**When Do You Need a Life Care Planner?** A life care planner is useful in legal cases that include workers’ compensation, personal injury, medical malpractice, and marital dissolution. The most comprehensive setting is in personal injury litigation and civil lawsuits. Attorneys, physicians, and insurance companies can hire life care planners to research, analyze and develop life care plans for patients of any age with birth injury, brain injury, spinal cord injury, stroke, trauma, burns, and other serious or chronic health conditions.

**A Life Care Plan**
- Addresses serious disability
- Establishes the goals and objectives for rehabilitation
- Discusses current and projected future requirements of care
- Summarizes medical, psychosocial, educational, vocational, and daily living needs
- Brings resources together
- Outlines a cost assessment of care and equipment needed over his or her lifetime
- Provides the patient/client/evaluatee and family and case manager with an outline of future care
- Ultimately maximizes an individual’s independence
- Protects financial assets

**Having Amy and her team serve as Life Care Planners is beneficial for individuals, families and funding sources for many good reasons:** Amy’s background is in rehabilitation counseling, health education, and nursing, all valuable to educate everyone involved, including a jury and a judge, about the plan and its intention. A plan is based on recommendations and information provided by the patient’s healthcare providers and community service providers concerning the medical equipment, services, treatment, and healthy living needs necessary for the person to work towards good health and independence. Simply put, “My job is to give a reasonable life care plan” ~ Amy

To prepare to design the plan, an initial meeting and follow-ups must take place, preferably if not mandatory, at the individual’s home. Following the initial meeting, a preliminary report is submitted. This report has the following main components to it:

**Vocational Resources Plus LLC**
P.O. Box 16005  •  Des Moines, Iowa  50316
Phone (515) 282-7753  •  eFax (914) 265-8709  •  VocResources@msn.com

**PRELIMINARY NEEDS ASSESSMENT**

Vocational Resources Plus LLC is owned by Amy E. Botkin, MS., CRC, CLCP Contact Amy at 515-282-7753 or vocresources@msn.com for more information. Amy’s blog is found at www.lcpresourcesplus.com where you’ll find a lively portrayal of her insight about work, healthy living and how Amy likes to facilitate ways to make others feel happy!
INTRODUCTION
INITIAL INTERVIEW
BACKGROUND / FAMILY DYNAMICS
HOME ENVIRONMENT / DURABLE MEDICAL EQUIPMENT
ACTIVITIES OF DAILY LIVING
COMMUNITY INVOLVEMENT / RECREATION / SUPPORT SYSTEM
ECONOMIC FACTORS / FINANCIAL MATTERS
ABBREVIATED MEDICAL HISTORY
HEALTH CONDITION / PHYSICAL LIMITATIONS / SUBJECTIVE COMPLAINTS
HEALTHCARE PROVIDERS / MEDICATIONS / HEALTHCARE SUPPLIES
RECOMMENDATIONS

Sincerely,
Amy E. Botkin
Amy E. Botkin, MS, CRC, CLCP
Certified Rehabilitation Consultant & Certified Life Care Planner

Following is a sample for informational purposes only outlining what a Life Care Plan (LCP) report may look like: Please note this is an extremely edited and shortened life care plan! Detail on pertinent findings, research, resources and information instrumental in the creation of the LCP is provided. The plan can be displayed using computer technology.

LIFE CARE PLAN

Prepared for
INDIVIDUAL’S NAME
Primary Disabilities: Listed Out

Prepared by: Amy E. Botkin, MS, CRC, CLCP
Life Care Planning Resources Plus LLC

***

LIFE CARE PLANNING

Thank you for the opportunity to assist with the development of Individual’s Life Care Plan. A Life Care Plan (LCP) is a road map of care used to answer questions regarding future medical care and costs associated with an individual's life long healthcare needs.

The goals of a comprehensive LCP are to: provide the clinical and physical environment for optimal recovery; improve and maintain the clinical state of the patient; prevent secondary complications; provide support for the family; and to help to develop a disability management program aimed at minimizing the long-term care needs of the individual.

Preparing a plan involves gathering information and data from several sources. I visited with Individual in person and on the phone, reviewed the medical records and professional reports, communicated with members of her healthcare team, contacted community service providers, and performed research prior to preparing this plan.
This plan contains information that is recommended to maximize Individual’s health and functioning. Her willingness to be responsible toward maximizing her health and well-being, along with her healthcare professionals’ willingness to keep an open mindset to any given situation is crucial to the enhancement and facilitation of her health goals.

INTRODUCTION: Individual is a XX year old person who sustained major trauma…..and the story unfolds…

SUMMARY: The history of the individual’s healthcare to date is summarized.

CONCLUSION

Based on my analyses of the individual’s condition and the information gathered, my professional opinion is stated. In this plan, all recommendations are projected only. There are options in this plan, offered to provide choices, requiring decision making from Individual. No collateral sources (i.e., Medicaid, State Funding, County Services) have been taken into consideration. An economist will be needed to determine the total costs and growth trend.

TABLE OF CONTENTS (Depending on Needs, a Table of Contents Lists All, for eg:)

A. PROFESSIONAL SERVICES
B. VOCATIONAL REHABILITATION
B. COUNSELING
C. THERAPY
D. MEDICATIONS
E. MEDICAL EQUIPMENT AND SUPPLIES
F. COMMUNITY SERVICES
G. FUTURE LIVING ARRANGEMENTS
H. SPECIAL ALLOWANCES
I. POTENTIAL FUTURE MEDICAL CARE NEEDS AND HEALTH RISKS (PROVIDED FOR INFORMATIONAL PURPOSES ONLY)

# PROFESSIONAL SERVICES

<table>
<thead>
<tr>
<th>Description / Provider</th>
<th>Age - Year</th>
<th>Frequency/ Replacement</th>
<th>Purpose</th>
<th>Cost Range</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Care Physician (PCP)</td>
<td>Beginning: 51 - 2013</td>
<td>Once a year, along with visits when necessary.</td>
<td>To monitor for changes in physical and psychological condition as related to health and disability.</td>
<td>$0 - $0 per appointment</td>
<td>Doctor Name</td>
</tr>
<tr>
<td></td>
<td>Ending: Life Expectancy</td>
<td></td>
<td></td>
<td>Per Year: $0 - $0</td>
<td></td>
</tr>
</tbody>
</table>

# VOCATIONAL REHABILITATION

<table>
<thead>
<tr>
<th>Description / Provider</th>
<th>Age - Year</th>
<th>Frequency/ Replacement</th>
<th>Purpose</th>
<th>Cost Range</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified Rehabilitation Counselor (CRC)</td>
<td>Beginning: XX - 2013</td>
<td>One time.</td>
<td>To prepare a vocational evaluation and/or loss of wages or earnings capacity report.</td>
<td>$0 - $0 per evaluation</td>
<td>Doctor Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Per Year: $0 - $0</td>
<td></td>
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</table>

# COUNSELING

<table>
<thead>
<tr>
<th>Description / Provider</th>
<th>Age - Year</th>
<th>Frequency/ Replacement</th>
<th>Purpose</th>
<th>Cost</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental Health Counseling /</td>
<td>Beginning: Age XX -</td>
<td>Monthly</td>
<td>Individual therapy.</td>
<td>Per Unit: $0 - $0</td>
<td>Doctor Name</td>
</tr>
</tbody>
</table>

Vocational Resources Plus LLC is owned by Amy E. Botkin, MS., CRC, CLCP Contact Amy at 515-282-7753 or vocresources@msn.com for more information. Amy’s blog is found at www.lcpresourcesplus.com where you’ll find a lively portrayal of her insight about work, healthy living and how Amy likes to facilitate ways to make others feel happy!
Vocational Resources Plus LLC * Amy E. Botkin, MS, CRC, CLCP
10-25-13 ~ Hope you are enjoying the conference!

<table>
<thead>
<tr>
<th>Clinician</th>
<th>2013</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ending: Age XX - 2015</td>
<td>Per Year: $0 - $0</td>
</tr>
</tbody>
</table>

### THERAPY

<table>
<thead>
<tr>
<th>Description</th>
<th>Age - Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupational Therapy</td>
<td>Beginning: Age XX – 2013</td>
<td>1 x year for 5-10 weeks (5-10 sessions)</td>
<td>Annually for 2 years and… explanation</td>
<td>$0 - $0 per session</td>
<td>Independent Living Services Supervisor</td>
</tr>
<tr>
<td></td>
<td>Ending: Age XX – 2015</td>
<td></td>
<td></td>
<td>Per Year</td>
<td>$0 - $0</td>
</tr>
</tbody>
</table>

### MEDICATIONS

Individual is currently prescribed # medications. Please see the document titled MEDICATION LIST WITH DRUG INFORMATION for complete detail on purpose, side effects, and what to watch for when taking the medicine. This list represents her current regimen and is certainly subject to change with aging and change in status. This does not take into consideration any medications such as antibiotics to treat infections.

### PRESCRIPTION MEDICATIONS

<table>
<thead>
<tr>
<th>Routine Pharmaceuticals (Prescribed)</th>
<th>Beginning &amp; Ending Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost</th>
<th>Recommended by</th>
</tr>
</thead>
</table>

### MEDICAL EQUIPMENT AND SUPPLIES

<table>
<thead>
<tr>
<th>Description / Provider</th>
<th>Age - Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motorized Wheelchair</td>
<td>Beginning: Age XX - 2013</td>
<td>Every 5 – 10 years</td>
<td>Mobility</td>
<td>Per Unit: $0 - $0</td>
<td>Doctor Name</td>
</tr>
<tr>
<td></td>
<td>Ending: Life Expectancy</td>
<td></td>
<td></td>
<td>Per Year: Prorate</td>
<td></td>
</tr>
</tbody>
</table>

### COMMUNITY SERVICES

<table>
<thead>
<tr>
<th>Item/Service</th>
<th>Age Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost Range</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Case Aid</td>
<td>Beginning: 2013</td>
<td>Weekly time: 2-5 hours per week</td>
<td>To assist with routine care and activities of daily living.</td>
<td>$00 - $00 per week</td>
<td>Social Worker</td>
</tr>
<tr>
<td></td>
<td>Ending: Life Expectancy</td>
<td></td>
<td></td>
<td>Per Year: $00 - $00</td>
<td></td>
</tr>
</tbody>
</table>

### FUTURE LIVING ARRANGEMENTS

**OPTION A: NEW HOME ALLOWANCE**

<table>
<thead>
<tr>
<th>Item/Service</th>
<th>Age Year</th>
<th>Frequency/</th>
<th>Purpose</th>
<th>Cost Range</th>
</tr>
</thead>
</table>

Vocational Resources Plus LLC is owned by Amy E. Botkin, MS., CRC, CLCP Contact Amy at 515-282-7753 or vocresources@msn.com for more information. Amy’s blog is found at www.lcpresourcesplus.com where you'll find a lively portrayal of her insight about work, healthy living and how Amy likes to facilitate ways to make others feel happy!
### REPLACEMENT

| An Accessible Home | XX | 1 x | Barrier free living, safety, accessibility. Closer to emergency services. | $95,000 - $145,000 |

Note: Estimate only: $200,000-$250,000 for new home - $105,000 sale price for existing home = allowance of $95,000 - $145,000.

### OPTION B: ASSISTED LIVING

<table>
<thead>
<tr>
<th>Item/Service</th>
<th>Age Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisted Living Community</td>
<td>Undetermined</td>
<td>Annually</td>
<td>Future Living Arrangement</td>
<td>Per Year: $14,400 - $34,029</td>
</tr>
</tbody>
</table>

### OPTION C: NURSING HOME

<table>
<thead>
<tr>
<th>Item/Service</th>
<th>Age Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Cost Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursing Home</td>
<td>Undetermined</td>
<td>Annually</td>
<td>Future Living Arrangement</td>
<td>Per Year: $54,385 - $58,035</td>
</tr>
</tbody>
</table>

### SPECIAL ALLOWANCE

<table>
<thead>
<tr>
<th>Description</th>
<th>Age - Year</th>
<th>Frequency/Replacement</th>
<th>Purpose</th>
<th>Allowance</th>
<th>Recommended by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respite Services</td>
<td>Beginning: 2013 Ending: Life Expectancy</td>
<td>Per Month</td>
<td>To provide short-term, temporary relief to those who are caring for family members.</td>
<td>Per Unit: $0 Per Year: $0</td>
<td>Social Worker</td>
</tr>
</tbody>
</table>

### POTENTIAL FUTURE MEDICAL CARE NEEDS AND HEALTH RISKS (PROVIDED FOR INFORMATIONAL PURPOSES ONLY)

Potential future medical needs and mental health risks are not costed out because it is not possible to estimate frequency, intensity, duration and treatment costs. A description of what may be needed and it’s is offered and who recommended it.

Respectfully prepared and submitted by,

Amy E. Botkin

Amy E. Botkin, MS, CRC, CLCP
Certified Rehabilitation Counselor
Certified Life Care Planner
Hope you are enjoying the conference!

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RESUME: Amy E. Botkin, MS, CRC, CLCP

Please contact Amy at 515-282-7753 or VocResources@msn.com for her most recent resume or you can download a copy of one at lcpresourcesplus.com/

Amy is currently studying Forensics Rehabilitation Counseling through The George Washington University.

The program is uniquely designed to provide focused insight in how forensic experts function within the legal system.