

# Guardianship/SSI Checklist for Special Needs Families

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## Before the Child Turns 18

- ✓ **1-2 Years Before**  
Research and Education:
  - Begin researching SSD, SSI, and the differences between Guardianship and Conservatorship.
  - Attend workshops or consult with a special needs planner or attorney.
- ✓ **1 Year Before**  
Documentation:
  - Start gathering medical, educational, and care documentation that demonstrates the child's disabilities and needs.Financial Review:
  - Review your financial situation, including your child's eligibility for SSI.
  - Consider setting up an ABLE account for your child's expenses.
- ✓ **6 Months Before**  
Legal Consultation:
  - Meet with a special needs attorney to discuss the need for Guardianship or Conservatorship.Application Preparation:
  - Begin preparing the application for SSI, to be submitted as soon as your child turns 18.

## Ongoing

- Annual Reviews: Prepare for and complete any annual reviews required for SSI and Guardianship or Conservatorship.
- Update Documents: Regularly update all medical, educational, and legal documents.
- Financial Management: Manage the child's finances, including SSI benefits and any other income, responsibly.
- Continued Education: Stay informed about changes in disability law and benefits.

## After the Child Turns 18

- ✓ **Immediately After 18th Birthday**  
Submit SSI Application:
  - Apply for SSI to establish financial support based on your child's disability.Initiate Legal Proceedings:
  - File a petition for Guardianship or Conservatorship if necessary.
- ✓ **1-3 Months After Filing**  
Medical Evaluations:
  - Complete required medical evaluations and interviews for SSI.Court Hearings:
  - Attend any required court hearings for the Guardianship or Conservatorship petition.
- ✓ **3-6 Months After Filing**  
SSI Decision:
  - Await the decision on the SSI application; this can take a few months.Guardianship/Conservatorship Approval:
  - Finalize the Guardianship or Conservatorship process if approved.

## Notes

- Local Variations: Legal processes and timelines can vary by state; always check local laws and regulations.
- Documentation: Keep detailed records of all applications, legal papers, and communications.
- This framework is a starting point. Each family's situation is unique, so tailor this checklist to your child's specific needs and consult with professionals where necessary.