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Academy of

Special Needs Planners

A Community Resource for Special Needs Planners

Memorandum of Intent

866-296-5509

www.specialneedsplanners.com

www.specialneedsanswers.com

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Our Intent

This Memorandum provides guidance to the guardian of our minor children with respect to child rearing practices, important choices and our wishes regarding our children's care. This memorandum is to be considered binding to the extent possible. However, we recognize that there may be circumstances that we cannot anticipate, so we request that all parties concerned act in accordance with our intent as set forth in this memorandum. We appoint the guardian of our minor children to carry out our wishes and desires as expressed herein. We direct our trustee to support our guardian to the greatest extent possible in honoring these instructions.

Our estate plan uses a Revocable Living Trust, Pour-over Will, and other documents. Should this memorandum conflict with any provision of our primary estate planning documents, i.e. our Revocable Living Trust or Pour-over Will, our Revocable Living Trust shall take precedence followed by our Pour-over Will.

Immediate Family and Friends

We are providing the following information so that our family, friends and organizations with whom our family is affiliated may be notified of our children's new guardianship and invited to participate in our children's lives.

Upon our children's being placed in a guardian's custody, please notify the following **family members** of our death or incapacity, and of the location of our children as soon as practicable:

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Upon our children's being placed in a guardian's custody, please notify the following **friends** of our death or incapacity, and of the location of our children as soon as practicable:

Upon our children's being placed in a guardian's custody, please notify the following **organizations** of our death or incapacity, and of the location of our children as soon as practicable:

Miscellaneous instructions:

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Important Information About Our Child (ren)

Child's Name: _____

Child's Date of Birth: _____

Child's Place of Birth: _____

Our Child's Primary Physician(s) (or the location of our child's medical records):

Our child has the following medical conditions and requires the following treatments:

Our Child's Therapist(s):

1. Name of therapist: _____

Type of Therapy: _____

Frequency of Therapy: _____

2. Name of Therapist _____

Type of Therapy: _____

Frequency of Therapy: _____

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3. Name of therapist: _____

Type of Therapy: _____

Frequency of Therapy: _____

4. Name of Therapist _____

Type of Therapy: _____

Frequency of Therapy: _____

Our Child attends the following school and extracurricular programs:

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Religion and Spirituality

Our children have been raised in the following religion or tradition:

It is important to us that our children:

- _____ continue to receive education in the religion above
- _____ be free to learn and follow their own conscience with regard to religion and spirituality
- _____ observe the following holidays:

_____ participate in the following religious community:

Education

We strongly prefer that our children attend:

Public School

- _____ the local public school;
- _____ the following public school: _____

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Education cont.

Private School

name of school: _____

if not available, we would like our children to attend a similar

- _____ parochial private school
- _____ classical private education (academic programs)
- _____ child-led private school (Waldorf, Montessori)
- _____ the guardian's homeschool, if any

In selecting and monitoring our children's educational experience, it is important to us that:

The guardian be closely involved in our children's education by:

- _____ attending all conferences
- _____ attending most family activities
- _____ volunteering at our child's school
- _____ visiting our child's school unannounced

The guardian helps our children develop educationally by

- _____ discussing all report cards carefully
- _____ rewarding educational success
- _____ helping our child to identify his/her interests and to pursue them inside or outside of a classroom
- _____ rounding out our child's education by providing opportunities outside of the classroom to enjoy:
 - _____ nature
 - _____ cultural events and places
 - _____ national travel
 - _____ international travel

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Discipline

It is important to us that our child be disciplined in a manner consistent with our values and child-rearing practices.

We believe that a child should not be punished for developmentally appropriate behaviors. Rather, we prefer that our guardian use distraction, redirection, negotiation or another non-punitive method of modifying our child's behavior so that the guardian and our child can live together in peace.

The following methods of discipline are totally unacceptable to us, and if our guardian feels he or she requires these methods, we wish that person to decline to accept guardianship of our children.

The following methods of discipline are those we use most frequently because we believe they are appropriate and effective:

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Parenting Resources

The following resources (books, organizations, etc) have been helpful to me as we have developed our parenting philosophy. We encourage our child's guardian to consider these resources for himself or herself:

Miscellaneous Instructions

Date this _____ day of _____, 20____.
