# Beneficiary Support Toolkit for Trust Professionals



# Chapter 2: Decision-Making

**Learning How Decisions Are Made**

It is important to understand who is involved in decision-making and decision-making preferences early on in a relationship with a beneficiary and family.

Below, we have provided a checklist to use to learn more about how decisions are made.

We hope these help you in your work!

**How Decisions Are Made Right Now**

We communicated the following to the beneficiary and any supporters:

We understand most people can make decisions on their own, with or without support, but some people have someone else legally appointed to make decisions for them.

We are asking these questions to understand how decisions are made right now – and how people want them to be made in the future.

We respect whatever way the beneficiary is making decisions right now, and we want to support them to make the decisions they want in the future.

They can learn more about decision-making options at [The Arc’s Center for Future Planning](https://futureplanning.thearc.org/pages/learn/where-to-start/supporting-daily-and-major-life-decisions).

We asked the beneficiary and supporters about how they currently make the following decisions:

Legal decisions

Financial decisions

Health care decisions

Everyday decisions

Other decisions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We have asked for and received the name and contact information for people who give advice or support to help the beneficiary make decisions. We have specified the areas they give help in and whether to include them on communications.

We checked whether any of the following arrangements are in place:

Supported decision-making agreement

General power of attorney

Limited powers of attorney (e.g., financial, medical, educational)

Full guardianship or conservatorship

Limited guardianship or conservatorship

Representative payee

Health care agent/proxy

Patient advocate

Other arrangement: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We have asked for a copy of the agreement(s), if possible, to understand the relationship and types of decisions the arrangement(s) covers.

We have the name and contact information of any people listed in a decision-making agreement – and any people who serve as back-up decision-makers.

We checked whether any of the following health care arrangements are in place:

Plan of care

Advanced directive

Living will

Do not resuscitate order

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We asked the beneficiary if they are happy with the way decisions are made right now.

We asked the beneficiary if they trust or are happy with anyone providing advice or making decisions via a formal arrangement.



**How Beneficiaries Want Decisions to Be Made in the Future**

We have asked if the beneficiary wants to change how they make the following decisions in the future:

Legal decisions

Financial decisions

Health care decisions

Everyday decisions

Other decisions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We encouraged the beneficiary to talk with their family and supporters about their wishes and to keep us informed if their decision-making arrangement changes.



**For Trust Staff – Next Steps**

We have added the information provided by the beneficiary to their records.

We have added any decision-makers or supporters to our communication records and lists.

We have taken any next steps as needed if we hear reports of potential abuse or neglect by supporters in a formal decision-making agreement.

We have plans to regularly prompt beneficiary to report about decision-making agreements and their future wishes.



**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

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