# Beneficiary Support Toolkit for Trust Professionals


# Chapter 2: Decision-Making

**Updating Decision-Making Arrangements and Goals**

Everyone’s ability to make decisions changes across a lifetime, including people with disabilities. Unexpected things can also happen at any time that affect people’s ability to make their own decisions. If plans aren’t in place, decision-making can become more limited, and people may have decisions made that don’t align with their goals. It is important to take time yearly to gather information on changes in decision-making arrangements and goals with beneficiaries.

The checklist below can help you include decision-making updates in your work.While it is not the role of a trust professional to change a person’s decision-making arrangement, understanding a beneficiary’s decision-making preferences may help you to identify challenge areas or potentially poor decision-making arrangements and remain informed if a decision-making arrangement does change.

**At Quarterly Check-ins and Site Visits**

[ ]  Confirm the status of decision-making arrangements. Sample questions include:

* Right now, our records say you have [this decision-making arrangement]. Is that still true?
* We share information with you and with [supporter]. Is this still a good person to share information with? Are there others we should also share information with?

[ ]  Ask 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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

[ ]  If possible, observe the surroundings around the beneficiary. If you see something that looks neglected, out of place, or concerning, ask about it. Make sure to ask who makes the decisions around the concerning object.

[ ]  Record notes and observations in the beneficiary’s file.

[ ]  Flag any concerns around decision-making or poor substitute decision-makers and follow your trust’s policies on dealing with these issues.

**At Yearly Planning Meetings**

Before the meeting:

[ ]  Review notes in the beneficiary’s file about decision-making arrangements, as well as feedback and notes from check-ins and site visits. Flag any items that need to be specifically addressed for the meeting.

[ ]  Send the beneficiary and any supporters a reminder to share updates to decision-making arrangements with you. If you choose, you may want to consider sharing [this website](https://futureplanning.thearc.org/pages/learn/where-to-start/supporting-daily-and-major-life-decisions) with beneficiaries to help them understand why it is important to update their decision-making arrangements regularly.

At the meeting:

[ ]  Confirm the beneficiary’s decision-making status, contact information for supporters, and any other details.

[ ]  Observe the interactions between the beneficiary and supporter or decision-maker. Follow up as needed on any previous concerns identified with the decision-making arrangement.

After the meeting:

[ ]  Record any updates and feedback in the beneficiary’s file.

[ ]  Flag any concerns around decision-making or poor substitute decision-makers and follow your trust’s policies on dealing with these issues.

**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)!

Date Revised: September 7, 2021.