# Beneficiary Support Toolkit for Trust Professionals



# Chapter 3: Evaluating Needed Supports and Services

**Matching Supports and Services With Life Goals**

Below are some ways that a trust could help support some common life goals that people have. This list is not comprehensive, but it can help you consider initial ideas.

However, it is also critical to recognize that people with disabilities and their families are the experts on the types of supports and services that will help them achieve their goals. While you may have ideas, listen to feedback and alternatives from beneficiaries about what they would like.

**I want to live on my own or in my own place.**

* Training on cooking, household chores, money management, etc., that people need to be more independent in their current home and in a future home
* Time with a real estate agent or housing expert to explore options in the community and help a person understand what they want in a next home
* Creation of a savings plan to put money to the side to save for renting or buying a home in the future
* Driving education or travel training, if a person wants to live somewhere that would require them to drive or independently navigate transportation
* If living on their own is not financially or otherwise possible, pay for people to have their own personal support and own room – instead of having to go along with a group, which may mean they get to do less of what they want to do

**I want to have a pet.**

* Pet care education classes or support – someone to help a person learn practically how to care for and feed a pet
* Help to pursue a volunteer or paid opportunity to care for animals – so that a person can learn more about animal care and behavior
* Support to move to a location that permits a pet (if that is not currently allowed in their home)
* Payment of a premium – if needed – to have a pet in the home
* Creation of a savings plan so that the person has the money to adopt, care for a pet, and pay any vet payments



**I want to drive/get my license.**

* Driving education/school to train the person on how to drive and assess whether the person is able to drive (this may take more than one course, depending on the results of the assessment)
* Payment, if needed, to secure a car for the state driving assessment
* Payment to secure a license or buy a car
* Travel training on alternatives to driving to ensure the person can be more independent in moving around, if the person is not able to safely pass the driving assessment

**I want to have more friends.**

* Training and education on identifying positive and negative relationships, how to grow friendships, practicing communication skills (e.g., how to actively listen, recognize nonverbal communication, and build your emotional awareness)
* Support people to pursue hobbies or interests and pay for those costs - mutual interests is one way to meet new people to become friends
* Payment for a phone, tablet, or computer so that people can connect online, including training and education on internet safety and privacy, if needed

**I want to get married.**

* Support training and education around how to pursue a romantic relationship, how to recognize good and bad romantic relationships, sex education and consent, and communication and other key skills (e.g., how to give and receive feedback, how to have difficult conversations, how to make decisions together and manage conflict)
* Payment for an online dating profile or matchmaking site
* Payment for a phone, tablet, or computer – so that a person can privately speak with potential romantic interests (or friends), including training and education on internet safety and privacy, if needed
* Marriage counseling for a couple seriously considering marriage
* Meeting with a financial planner to help review public benefits and resources and plan for how to get married without impacting benefits
* Support for a couple to plan a wedding or for wedding-related costs, if possible (e.g., payment for a wedding planner)

**I want to go to college or get more education.**

* Educational counseling with an advisor to help better understand what a person wants to learn
* Payment for any application fees and tuition at a college or other educational institute
* Payment for any personal support or transportation needed to get to or from college or for a course
* If a person would need to move to pursue college education, create a financial plan on how much money would be needed to make this change, and work with the beneficiary and supporters to determine how this would happen and what the trust could pay for



**I want to have a good job or career.**

* Support a person to pursue technical education or academic education, as well as support for a person to learn key communication skills (e.g., how to write or communicate in a professional environment, how to actively listen, how to present information with confidence, how to share feedback with others, building emotional awareness, and recognizing nonverbal communication)
* Payment for assistance in writing a resume and practicing interviewing
* A job coach to help someone get and keep a job
* Ongoing technical training or education, once a person has a job
* An employment counselor to help someone decide what they want their career to look like in the future
* Transportation costs to get to/from their job each day

**I want to be healthier.**

* Payment for a personal trainer or nutritionist
* Support to buy a health tracker (e.g., Fitbit) and a phone or tablet to track progress and encourage healthy behavior
* Gym membership or payment of exercise equipment and any membership costs
* Payment for cooking, health, or exercise classes that people want to take
* Payment for an online or in-person support class that can help emotionally support a person who is going through a health transformation
* Transportation costs to get to/from a gym or course

**I want to advocate/be a leader.**

* Payment to attend leadership classes, self-advocacy classes, and conferences related to interests a person wants to advocate around
* Transportation costs to get to/from these classes or events
* Payment for mentorship from another leader to help a person grow in their skills
* Phone, tablet, or computer so that people can view online training and resources, and practice advocacy by writing letters and emails, posting videos, and using other media, including training and education on internet safety and privacy, if needed

**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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