AGING IN MAINE
A PRACTICE OF KEVIN W. WEATHERBEE LAW OFFICES, PLLC

Autism Estate Planning Checklist for Maine Families

A Simple Guide to Help You Get Started

Planning for a loved one with autism looks different for every family. Use this checklist to organize key information and begin thinking through important decisions.

Basic Information

☐ Full Name of Individual: ________________________________
☐ Date of Birth: ________________________________
☐ Primary Residence: ________________________________

☐ Primary Caregiver(s): ________________________________
☐ Contact Information: ________________________________

Daily Life & Support Needs

☐ Current living arrangement:

____

☐ Level of independence (check one):
☐ Fully independent
☐ Some support needed
☐ Significant support needed

☐ Areas where support may be helpful:
☐ Medical decisions
☐ Financial management
☐ Education or employment
☐ Daily living activities

☐ Notes:

____
____

Decision-Making Planning (Age 18 and Beyond)

☐ Does the individual currently make their own decisions?
☐ Yes
☐ No
☐ With support

☐ Planning tools to consider:
☐ Power of Attorney
☐ Health Care Directive
☐ Supported Decision-Making
☐ Guardianship or Conservatorship (if appropriate)

☐ Notes or concerns:

____
____
____

Financial Overview

☐ Bank accounts identified
☐ Investment or retirement accounts identified
☐ Life insurance policies reviewed
☐ Monthly income sources listed

☐ Current benefits (if applicable):
☐ MaineCare
☐ SSI
☐ SSDI
☐ Other: ____________________________

Notes:

____
____
____
____

Estate Planning Documents

☐ Will in place
☐ Revocable Living Trust
☐ Special Needs Trust (if applicable)
☐ Powers of Attorney
☐ Health Care Directive

☐ Beneficiary designations reviewed and updated

☐ Notes:

____

____

Special Needs Trust Considerations

☐ Has a Special Needs Trust been created?
☐ Yes
☐ No
☐ Not sure

☐ Trustee selected: ______________________________

☐ Backup trustee identified: ______________________________

☐ Notes:

____

____

Housing & Long-Term Planning

☐ Current housing plan is stable
☐ Future housing options considered

☐ Long-term goals:

____

____

____

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Letter of Intent

☐ Letter of Intent started
☐ Letter of Intent completed

Include details such as:

1. Daily routines
2. Medical providers
3. Preferences and goals
4. Important relationships

☐ Notes:

____

____

MaineCare & Long-Term Care Planning

☐ Understand eligibility basics
☐ Planning ahead for future needs
☐ Questions about asset protection

☐ Notes:

____

____

Next Steps

☐ Gather key documents
☐ Identify questions or concerns
☐ Schedule a planning consultation

Legal Disclaimer: This material is for general informational purposes only and does not constitute legal advice. No attorney-client relationship is created by the use of this checklist. This checklist is not a substitute for legal counsel and should not be relied upon as a legal document.

Individuals seeking legally binding estate planning or incapacity planning documents should consult a licensed estate planning or elder law attorney in the State of Maine.

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