



# FAMILY FOCUS™

February 2007

PARTNERS IN PLANNING



FRIENDS FOR LIFE

THE LAW OFFICES OF  
HOYT & BRYAN, LLC



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†BOARD CERTIFIED ELDER LAW

HOYT & BRYAN, LLC  
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## A SPECIAL LETTER OF INSTRUCTION AN IMPORTANT ADDITION TO YOUR SPECIAL NEEDS PLANNING

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Many of you have heard about the importance of creating a document that contains the kind of information that only a family member can create - and which provides a format to communicate the vision of your desires and concerns for your child to his/her future caregiver. We can help you develop a Special Letter of Instruction to serve this purpose. The most important asset your child has is YOU.

Think for a moment about the specific instructions or guidelines you give to your child or his/her caregiver when you leave for just an evening or a weekend. Imagine if you went away and never came back. Certainly you have a picture of what you would like their life to look like after your death. However, the next caregiver may not have the same ideas and insight as you. A Letter of Instruction will provide you the format to communicate your desires and concerns to current and future guardians.

This is not a legally binding document, but it is perhaps one of the most important documents you can prepare for the future well-being of your child. If you have entrusted a dedicated sibling, friend, relative, trustee, or organization to look after your child when you are gone, you can help to guide them by providing them with the knowledge that only you, as a parent, possess.

Some sample topics to include are: biographical and family information, medical history, important people, list of advisors, location of important documents, personality traits and preferences, personal care information, important daily routines, additional information, general statement of desires, your daily checklist, monthly budgetary needs, food allergies, clothing preferences and sizes, and most importantly your hopes, dreams, fears, wishes and aspirations for your special needs persons future.

Of course, you should periodically review and revise this letter - perhaps on your birthday, or your child's. Be flexible, be clear, and feel free to make it as personal as you wish.

To find out more about a Special Letter of Instruction or planning for a loved one with special needs please join us on

**Thursday, February 22, 2007 at 6:00 p.m.** for our complimentary workshop, **"Special People, Special Planning."**  
Please call 407-977-8080 to reserve your seat today.

## UPCOMING EDUCATIONAL WORKSHOPS

### February Workshops

Truth About  
Medicaid Planning

Wednesday, February 7, 2007 at 9:30 a.m.

Truth About  
Estate Planning

Tuesday, February 20, 2007 at 6:00 p.m.  
Tuesday, February 27, 2007 at 9:30 a.m.

A Matter of Trust

Tuesday, February 13, 2007 at 6:00p.m.

Special People, Special Planning

Thursday, February 22, 2007 at 6:00 p.m.

Advisor Lunch & Learn

Tuesday, February 6, 2007 at 12:00 p.m.

Office Closed - President's day

Monday, February 19, 2007

### March Workshops

Truth About  
Medicaid Planning

Wednesday, March 14, 2007 at 9:30 a.m.

Truth About  
Estate Planning

Tuesday, March 13, 2007 at 6:00 p.m.  
Thursday, March 29, 2007 at 9:30 a.m.

Advisor Lunch & Learn

Tuesday, March 6, 2007at 12:00 p.m.

Loving Without A License

Tuesday, March 20, 2007 at 6:00 p.m.

All public workshops are complimentary and are held in our Learning Center please call 407-977-8080 to RSVP or visit [www.HoytBryan.com](http://www.HoytBryan.com).

## GLAD YOU ASKED

### Question:

Who can establish a Special Needs Trust and does a Special Needs Trust qualify a person for public benefits?

### Answer:

A Third-Party Special Needs Trust can be established by one person for the benefit of another. The person establishing the Trust - called the settlor, grantor or trustor - chooses to make some of his or her assets available for the benefit of the disabled beneficiary. Third-Party Special Needs Trusts are often established by parents or grandparents for their disabled children.

A Special Needs Trust does not itself make public benefits available. Nor does it make it easier to qualify for them. The beneficiary must qualify for the benefits program - either before or after the Trust is established. If properly designed, the Trust will not cause a loss of benefits - although the level of benefits may be reduced in some circumstances.

Please call us at 407-977-8080 for more information or to setup a personal consultation.

### ESP Clients

**Annual Client Meeting**  
**February 10, 2007 at 9:00 a.m.**  
Please RSVP to Meghan no later than February 7, 2007

### HAPPY VALENTINE'S DAY

**Hoyt & Bryan, LLC**  
**now offers gift certificates!**

This year give the ones you love the gift of planning. Gift certificates are available in any denomination and can be used toward our estate planning services.

**Please contact Meghan at 407-977-8080 for more information or to order your gift certificate today!**



# THE LAW OFFICES OF HOYT & BRYAN, LLC

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### **Mini Hot Fudge Cakes with Strawberry Hearts**


*This sweet treat will  
warm anyone's heart!*

- 1 box Betty Crocker® Complete Desserts® triple chocolate hot fudge cake mix
- About 1 quart strawberries
- Ice cream, if desired

1. Make, bake and cool Mini Hot Fudge Cakes as directed on side of cake mix box.

2. Place each cake on dessert plate. For each dessert, slice 2 or 3 strawberries. To make slices look like hearts, cut small "V" at rounded end of each slice, using small sharp knife. Randomly place strawberry slices around cakes. Serve warm with ice cream.

## February 2007

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6 Advisor Lunch & Learn @ 12:00 p.m.	7 Truth About Medicaid Planning @ 9:30 a.m.	8	9	10 ESP Annual Client Meeting @ 9:00 a.m.
11	12	13 A Matter Of Trust @ 6:00 p.m.	14 	15	16	17
18	19 Office Closed President's Day	20 Truth About Estate Planning @ 6:00 p.m.	21	22 Special, People Special Planning @ 6:00 p.m.	23	24
25	26	27 Truth About Estate Planning @ 9:30 a.m.	28			