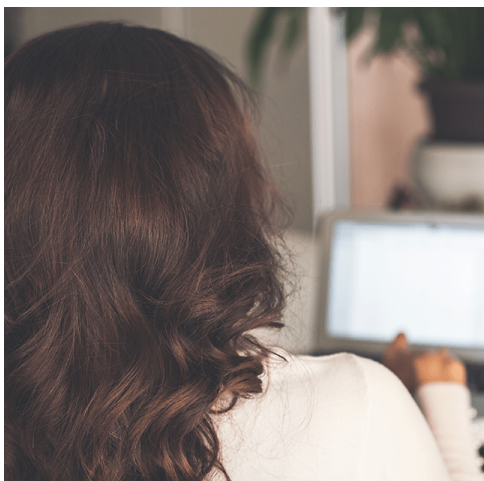


## Special Needs Planning

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### Section Chair

Dana B. Perry

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The team at Chambliss takes a very personal and proactive approach to special needs planning. Our interdisciplinary team of attorneys and licensed social workers have both personal and professional experience assisting individuals with developmental disabilities, traumatic brain injuries, and other cognitive disabilities. We understand the obstacles that arise when planning for a loved one with special needs and use our experience to assist our clients in meeting their needs and goals.

Our special needs planning clients receive individualized services to address their needs and goals. Our team, which includes Tennessee licensed social workers, is able to provide home visits, prepare and review life care plans, assist with Social Security disability and other benefits, draft supplemental/special needs trusts (SNTs), develop specialized estate plans, and identify independent and assisted living options.

We strive to map out a holistic plan to address legal, financial, and personal care needs to minimize future expenses and maximize protection. Transition Planning is designed to grow with each individual well into their future. By working with a circle of support that may include family, friends, financial advisors, trustees, and community programs we can create a transition plan, to ensure all needs are met; including but not limited to: individualized social and recreational services, conservatorship/guardianship, medical debt management, health insurance and benefits assistance and guidance, college or ABLE account funding, housing needs, transportation, and job or volunteer opportunities. We strive to give our clients peace of mind, minimized stress, and confidence knowing they have a plan for the future.

### Experience

Asset preservation, including First-Party Special Needs Trusts (d4A trusts) and Third-Party Special Needs Trusts

### Related Services

- Asset Protection Planning
- Conservatorships and Guardianships
- Elder Law, Long-Term Care and Medicaid Planning, and Care Coordination
- Estate Planning

### Related Industries

- Individuals, Families, Estates, and Trusts

### Related People

- Shelton Swafford Chambers, CPA
- Amy B. Boulware
- Rebecca H. Miller
- Dana B. Perry
- David B. Roberts
- William "Dub" Ellis
- Lydia M. Boydston
- Colin A. Wolfe

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Benefits planning, including Medicaid, Medicare, SSI/SSDI/CDB, and maximizing Social Security retiree benefits

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Disability and incapacity planning, including guardianships, conservatorships, and powers of attorney

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Comprehensive care planning that addresses care needs such as transportation, housing, home care, employment, and volunteer opportunities

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Multiple aspects of planning for the needs of elder parents who have adult children with disabilities

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Advising of trustees of special needs trusts

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