



## Meet Michele A. Leahy MS, CPWIC

Founder and CEO of Leahy Life Plan



Ms. Leahy is the founder and CEO of Leahy Life Plan, a firm dedicated to life planning for those with disabilities as well as their families. She understands disability challenges from both a professional and personal perspective. Her goal is to assist in developing strategies of funding special needs trusts and creating a roadmap to meaningful adult supports.

With over 15 years of experience, Michele will guide you through some of the most challenging decisions of your life while planning for your loved one's future.

\*Michele is licensed in Life and Health Insurance.

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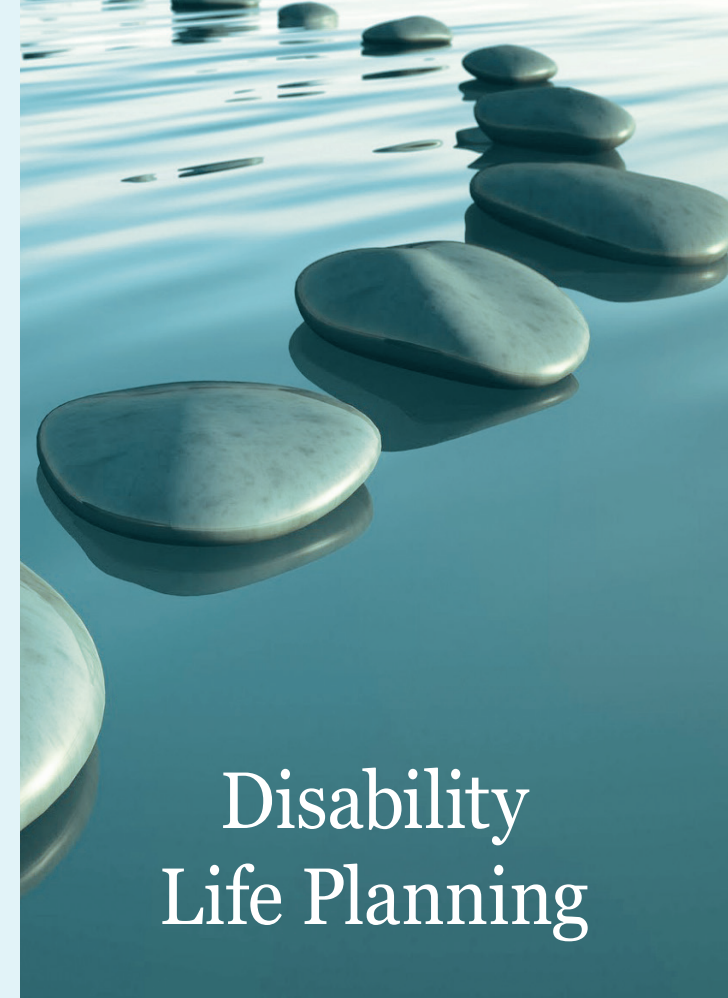
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## Menu of Services

Working to suit your family's individual needs, Leahy Life Plan (LLP) offers several different bundles of services or, if needed, à la carte services. We provide:

-  Long-term holistic planning
-  Help in obtaining and maintaining SSI/SSDI even while working
-  Guidance on securing Government Waivers, Medicare/Medicaid
-  Strategies and help funding Special Needs Trusts
-  Adult Advocacy and Transition Planning
-  Person-Centered Planning and more!



## Disability Life Planning

Navigating government,  
community and financial  
supports for your loved one  
with a disability.

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# Guidance you need. Experience you can trust.

Choose from one of our bundles of services or customize your own package to fit your family's needs. Services are also available à la carte.



## Federal Benefits

- Review past and current **disability documentation**
- Review **individual's assets and resources**
- **Assess federal benefits** (SSI/SSDI/Medicaid/Medicare) eligibility
- Provide guidance in the gathering and **completion of documents** including testimonials and functional reports
- Prepare individual and caregiver for **Social Security Administration (SSA) interview**
- Assist with obtaining **maximum benefits**
- Working and receiving **SSA benefits**

## State Benefits

- **Explain what Waivers are**, and the different Waiver options available
- **Review the applicability** of state benefits and Medicaid eligibility
- Explain how to be **eligible for Waivers** through Medicaid
- Assessing and advocacy services regarding **Individualized Support Plan (ISP)**
- Guide you through the process of **obtaining Waivers**
- Assistance with **Medicaid spend-downs**
- Assess **individual's current and potential assets**
- Discuss **housing options**
- Implement **Person-Centered Planning** into ISP goals

## Financial and Community Planning

- Encompasses **Waiver and SSA Packages**
- Discuss strategies on **long term future planning**
- Help you understand the purpose of **Special Needs Trusts**
- Review strategies on **best ways to fund a Special Needs Trust**
- Discuss differences and intertwining of **federal, county and state based benefits**
- Assess individual's **current and potential assets**
- Explain **Power of Attorney vs. Guardianship**
- Give **meaningful referrals** to other services/agencies/professionals
- Preparation for **Person-Centered Planning and Microboarding**

