*Jennifer R. Figurelli, CTFA & Andrew D.W. Hill, CFA*

***With more than 50 years of combined experience working and living in the Naples area, Andy Hill and Jennifer Figurelli are here to serve the unique financial needs of their clients.***

***Available 24/7, Andrew Hill Investment Advisors is there when a client needs them the most.***

**ResponsibleAdvisors.com**


**Andrew D.W. Hill, CFA**
**President & Co-Founder**
**andy@responsibleadvisors.com**
**239-777-3188: Direct Dial**

---

**Jennifer R. Figurelli, CTFA**
**Co-Founder, Wealth Advisor &**
**Chief Compliance Officer**
**fig@responsibleadvisors.com**
**239-777-3129: Direct Dial**


*ResponsibleAdvisors.com*



Andrew Hill
Investment Advisors, Inc.
ResponsibleAdvisors.com

# Financial Concierge Services

## Planning Considerations For Special Needs Families


4081 Tamiami Trail North, Suite C-105
Naples, FL 34103

239-777-3129 or 239-777-3188
Facsimile: 239-236-0484


***ResponsibleAdvisors.com***

**As representatives of the financial industry, the Co-Founders of Andrew Hill Investment Advisors, Inc. believe that we have a responsibility to provide a high level of personalized service to *all* clients, regardless of the size of their portfolios.**

**Families with special needs children face a number of financial challenges. As Responsible Advisors, we have a passion in helping special needs children and adults achieve quality of life. This is accomplished by coordinating the financial planning process with our families' legal, tax and healthcare professionals.**

***ResponsibleAdvisors.com***

**As your trusted advisor, our mission is to serve as a resource for special needs families by helping them accomplish the following:**

- Safeguard your child's assets from creditors and predators
- Preserve your child's eligibility for government benefits
- Ensure proper supervision, management and distribution of an inheritance for a special needs child
- Confirm that the essential estate planning documents are prepared for a special needs family

**We realize that "it takes a team to plan for a special needs child" and we hope to be a member of your family's team of professionals.**

***ResponsibleAdvisors.com***

## Examples of Services for Special Needs Families:

Evaluate current planning documents

Review available financial planning options

Assist in selecting a trustee for a Special Needs Trust

Develop an Investment Policy Statement specific to the trust's short and long-term goals

Review the appropriateness of trust distributions to ensure qualification for government benefits

Work with case manager/care coordinator to implement budget

Assist with banking needs, financial products, forms, etc.