

SUPPORTED DECISION- MAKING CHECKLIST

LEGACY LAB APP



LEGACY LAB
Prepare Those You Love Most

HOW TO USE THIS CHECKLIST

Supported Decision-Making (SDM) allows individuals to make their own life decisions with help from trusted supporters. Instead of removing rights—as in guardianship—SDM empowers independence while ensuring the person has the assistance they need to understand choices, communicate decisions, and stay in control of their life.

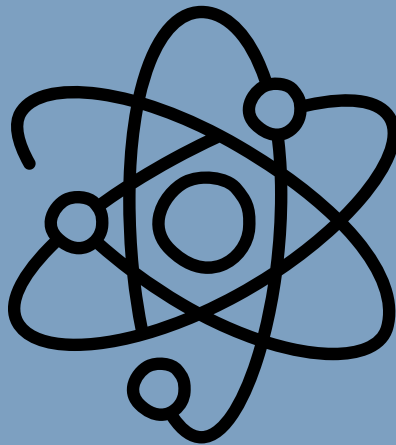
This checklist walks you through each step of creating an SDM plan, whether for yourself or someone you support. Use it to identify where help is needed, choose the right supporters, and create a clear agreement that reflects the individual's wishes and values.

“INDEPENDENCE IS NOT DOING
EVERYTHING ALONE, BUT HAVING
THE SUPPORT YOU NEED TO THRIVE”

JUDITH HEUMANN

LEARN ABOUT SDM

- Understand the difference between SDM and guardianship
- Learn how SDM keeps the individual's rights intact
- Research your state's laws, as some states formally recognize SDM agreements

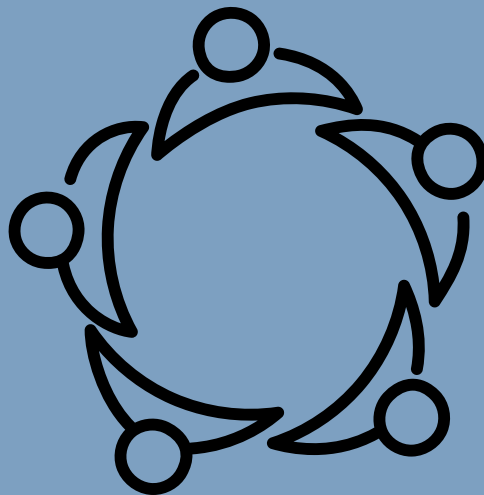


“KNOWLEDGE IS THE FIRST STEP
TOWARD INDEPENDENCE”

UNKNOWN

IDENTIFY AREAS WHERE SUPPORT IS NEEDED

- Medical decisions
- Education or employment choices
- Financial matters
- Housing and daily living decisions
- Communication and social support

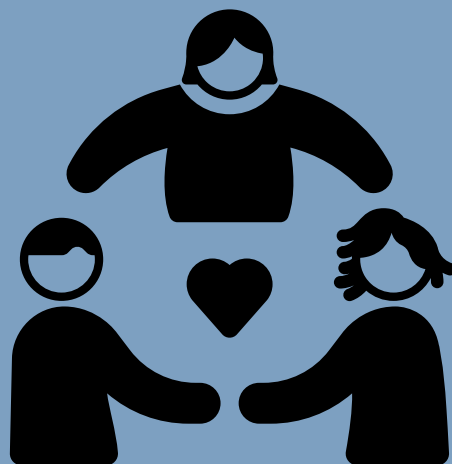


“WHEN WE HAVE THE FREEDOM TO
MAKE CHOICES, WE HAVE THE
FREEDOM TO SHAPE OUR LIVES”

ED ROBERTS

CHOOSE TRUSTED SUPPORTERS

- Family members, friends, mentors, or professionals
- Select individuals who respect your wishes, values, and communication style
- Discuss expectations openly so everyone understands their role



“WE ARE NOT PROBLEMS TO BE
SOLVED. WE ARE PEOPLE WHO
DESERVE TO BE HEARD”

ALICE WONG

DEFINE THE TYPE OF SUPPORT

- Explaining options in plain language
- Helping weigh pros and cons
- Attending appointments together
- Assisting with paperwork or online forms
- Communicating decisions to others when needed



“EMPOWERMENT IS THE ABILITY TO
MAKE CHOICES, AND THE FREEDOM
TO ACT ON THEM”

UNKNOWN

DRAFT AN AGREEMENT

- List supporters and their roles
- Clarify the types of decisions they will help with
- Identify how support will be provided (in person, phone, video, notes, etc)
- Outline how to change, update, or end the agreement when needed



“NOTHING ABOUT US WITHOUT US”

PROVERB

PUT IT IN WRITING

- Use a simple SDM form or state provided template
- Have the individual and supporters sign
- Share copies with relevant professionals (doctors, schools, employers, banks, case managers)



“AUTONOMY IS NOT A LUXURY; IT IS
A BASIC HUMAN RIGHT”

ADRIENNE MAREE BROWN

REVIEW AND UPDATE REGULARLY

- Review the agreement annually or when major life changes occur
- Update supporters or support types as needs shift
- Ensure the plan continues to promote independence at every stage of life





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Prepare. These You Love. Ahead.

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www.LegacyLabApp.com

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A white rounded rectangular button with a black border. On the left side, there is a black icon of a smartphone. To the right of the icon, the text "Download the" is in a smaller font, and "App Now" is in a larger, bold font. Above the right side of the button, the word "ios" is written in white on a black rectangular background.