

# Helping Individuals & Families with Special Needs

PLAN WITH CARE & CONFIDENCE

**BRIAUD**  
*financial advisors*

## Planning for Individuals with Special Needs is Personal

My son Ryland is one of the most genuine, loving people you will ever meet. Like many boys his age, he loves sports and is a passionate, active spectator and fan—but unlike you and I, he always cheers for both teams no matter how much he wants his team to win.

My journey into the world of special needs started with Ryland's diagnosis. Ryland has autism—and while we do not know yet whether he will be able to navigate the world independently, we want him to reach his full potential and have the resources to do so.

Although my journey started with Ryland, it has continued through the love and support of the many families we've had the privilege to help. We are honored to have been their guide—whether that means navigating federal benefits, creating life plans, or generally providing a partner for support in navigating life's questions.

What does the future look like for an individual with special needs and their family? No two situations are the same, but with a Chartered Special Needs Designation, I can provide guidance that offers families peace of mind and ensures they are able to focus on what is important: loving their child.

*- Natalie Pine*

CFP®, ChSNC®  
Managing Partner/Advisor



## An Advocate FOR *families*

We understand that families want the best care and support imaginable for their family member with special needs. We are proud advocates for our clients, and we fight to make sure all of their needs are met. With knowledge of the federal benefits system and its nuances, we can help protect families from taking missteps or following misinformation that leads to frustration and loss of potential benefits.

*“We are very grateful to Briaud. They always keep planning for our daughter with special needs in mind. They explained how a directed trust works and how it might protect our daughter when we aren't around. We're thankful for their insights and planning.”*

— CURRENT BRIAUD CLIENT (UNPAID TESTIMONIAL)

Proper planning can provide peace of mind for a family's future. That future sometimes includes an unforeseen need for extra support for their children. We are there to guide them through the federal system to help fund that extra care.

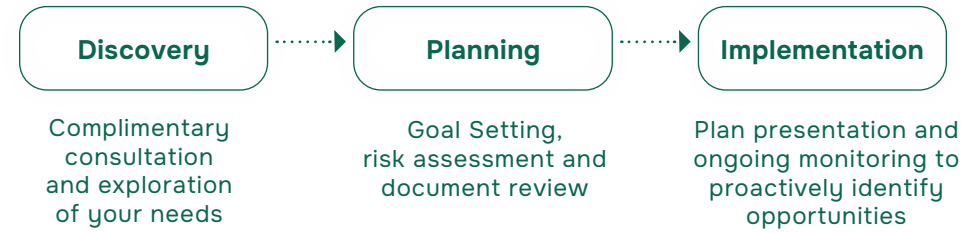
The bottom line is families navigating the world on behalf of an individual with special needs have a champion in Briaud.



# Working Together

We begin with a complimentary discovery meeting to get to know you and your family. From there, we develop a personalized plan informed by your unique circumstances. At Briaud, planning goes beyond the basics, incorporating a thorough review of your family’s values, money history, and goals.

## Our Process



Briaud’s services provide peace of mind and lifelong support, ensuring families with special needs have a trusted partner in their corner.



## Our Briaud Family

Since 1986, Briaud Financial Advisors has advocated on behalf of families, understanding their goals and planning for their future. Briaud was founded by Janet Briaud, a woman who had a negative experience with a commission based brokerage firm and vowed to ensure that clients would always have a place where their interests were put first. She made sure that the only compensation received at Briaud is from clients, thus our fee-only status that is dedicated to full transparency and our clients’ success.

# Our Services

## Legacy Planning

We collaborate with professionals to create life plans that ensure the legacy left to individuals with special needs do not jeopardize their eligibility for benefits. These plans not only include structures such as special needs trust but also provide clarity on education, finances, living arrangements, and life goals through every stage.



## Benefit Navigation

We identify and maximize all qualified government benefits to enhance quality of life.

## Minimizing Taxes and Optimizing Returns

We leverage tax strategies for individuals with special needs to maximize the legacy available to them and align investments with long-term goals while minimizing future costs.



# BRIAUD

*financial advisors*

Families with individuals with special needs can rest assured they are in capable, caring hands.

Please contact us.


You can scan the code below to schedule a meeting with Natalie Pine.



  
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