Lifestyle Directive- Brett C.

Revised 7/7/16

This document is to serve more as a blue print or “wishes” to assist in caring for Brett in the event I pass away. Also included with this document is “Who is Brett Cordova” as well as “Important Phone numbers” that pertain to Brett.

Brett’s DOB is 11/17/93

Brett’s SS # xxx-xx-xxxx

Brett has Limited Conservatorship (Rebecca Weisman attorney-975-1075). Co-Conservators: Joe W., Kathy W., Derek C. and Chad W. (I, too am a co-conservator)

Also in effect: Brett Thomas C Special Needs Trust (Rebecca Weisman attorney-975-1075. EIN # xx-xxxxxxx

Please note: All of the pertinent files pertaining to this directive (SSI, Medical, IHSS, Conservatorship, Special Needs Trust, SVDN Day program, Banking, San Andreas Regional Center and Employment and Community Options etc) are all kept together in the file cabinet to the left of my desk top computer. All of Brett’s medical evaluations and assessments as well as all past IEP’s are kept in the horizontal file cabinet in the garage. 3rd drawer.

Brett currently receives $xxx.00 a month social security which is direct deposited into his bank account at Chase Bank on Lincoln Avenue, SJ 95125. I am the representative payee. Receipts and records are kept for all purchases pertaining to Brett breaking down from shelter/food and all other expenses. I keep the receipts and his bank statements for the annual audit by the Social Security Administration. This typically happens in April.

Upon my passing, a new representative payee will need to be put in place and can be any of the co-conservators (Joe W. first choice). Convicted felons may not be representative payees. I use a blue home budgeting book to keep track of his groceries, fast food and then clothing, movies, dvd’s, bowling, shoes, outings etc. The social security administration needs to be notified of new payee as well as if any of Brett’s current living arrangements change. There is a maximum amount that Brett can receive for SSI as well as a screwy math issue that prohibits anyone paying for or assisting Brett’s costs for housing, food or clothing. I could explain this in this document but it’s easier just to ask Joe or call Joanna J. or Trudy M. at Parents Helping parents for the particulars. I have included the math computations in Brett’s SSI file to refer to. More than anything, you don’t want to mess with the SSI parameters as it can affect Brett’s Medi-Cal and/or require him to pay back $$ if he earns or receives too much money outside of SSI. It’s the biggest barrier to Brett having a “job”. The maximum amount of money that Brett can have in his account is 2000.00, but we always try to spend as close to the amount that he receives so that he run’s close to a zero balance.

On average per month w/o housing costs or utilities, I spend approximately 500.00 a month on Brett’s groceries, restaurants, clothing, dvd’s, outings. Sometimes more, sometimes less. This is on average.

Brett is a client of San Andreas Regional Center (diagnosis Autism and I.D.). His SARC Coordinator is Ruby S. (408)xxx-xxxx. Currently, Brett receives xx hours a quarter of respite from SARC (can be used for respite or camp’s like Camp Krem) Ruby meets with Brett and I no less then once a year in November to review his goals/outcome, concerns, health, housing etc which are then written up in a IFSP or IPP in effect for one year. Brett also receives his SVDN home program and transportation funding through San Andreas Regional Center. Additionally he receives Independent Living Skills training through Employment & Community Options (Garrett D. (xxx)xxx-xxxx Coordinator.)

We have established a trust for Brett called: Brett Thomas Cordova Special Needs Trust (tax i.d. xx-xxxxxxx), so that upon the wishes of family upon their death, they can denote making that trust their beneficiary and as well as create a funding model to support Brett into his future without impacting his social security and medi-cal benefits. The trust cannot be used for food, housing or shelter.

Brett currently attends Hope Service Adult Program Silicon Valley Diversified Network M-F. He is picked up and dropped off to our home by staff. Monday he attends from 8:55 to 1:35, T-F he attends from 8:55 to 2:35. His schedule of daily activities fluctuates and can include bowling, trips to the YMCA, various vocational opportunities, community service activities, life skill activities, recreational or hobby classes like photography or hiking etc. He enjoys his “program” very much and seems to be adapting well to his new friends and staff.

SVDN’s program director is Sheri Najera. His phone number is (408)915-1223

Brett also participates in Special Olympic activities. So far the only two activities that he has tried have been bowling and basketball. He has expressed an interest in softball or baseball which are summer activities and typically Brett is in Montana during the summer months therefore unable to attend the S.O sessions. I receive e-mail at my e-mail (joesquared24@hotmail.com) notifying me when sign ups occur. Special Olympics Santa Clara Valley e-mail is:

Brett’s doctor is Dr. Dina S. Phone number is (xxx)xxx-xxxx Office located at 15400 Los Gatos Blvd. Los Gatos. Brett has no ongoing health issues and is on no medication. He goes to the doctor once a year at least unless more often is necessary. He faints whenever blood is drawn. This office does take Medi-Cal.

Brett’s Medi-Cal #. His Medi-Cal is service through Santa Clara Family Health Plan and his I.D. is .

Brett is also covered under his Dad’s Blue Cross/Anthem insurance plan through the Stationary Engineers Union.

NOTE: Brett hates going to the doctors, hates anyone talking about going to the doctors and will assume if anyone is going to the doctors it’s “code” for him going to the doctors. He will need reassurance if he overhears anyone talking about being sick or needing to go to the doctors that “Brett is fine, he is not going to the doctors”. Best to tell him only a few days prior to a doctor’s appointment if possible. He will perseverate on that appointment and ask about shots, etc.

Brett currently receives xx:xx hours a month at 13.00 an hour of In Home Support Services which is a social services program available to Medi-Cal clients. Currently, I am the only paid provider. The hours are to be used for housecleaning, meal prep, grocery shopping, transportation to and from medical appointments. There is a file called IHSS with all the information you will need as well as Brett’s social workers name and phone number. Upon my passing, the co-conservators will have to secure another IHSS worker. This can either be someone known to us or you can go through IHSS to try to find a worker. There is a orientation, on line class, finger printing and background check (sponsored by Public Authority) for any and all IHSSS workers

Brett’s dentist is Dr. B. of Dr. Adolpho B. dentist office. Phone number is (408)xxx-xxxx. 40 Jeffers Way Campbell, CA., 95008. He goes to the dentist twice a year and to date has had no cavities. He wears a retainer/mouth guard every night (had 7 years of braces). Mouth guard is necessary due to his teeth grinding). Although Dr. Barrera’s office is pediatrics, Dr. Barrera has agreed to continue serving Brett on into his adulthood. Brett has had all 4 wisdom teeth removed 5 years ago. If Brett needs a new retainer, either Dr. Barrera can refer an orthodontist or his old orthodontist, Dr. Stacey L. (408)xxx-xxxx, could make one for him after fitting him for it.

In the event that I am rendered unable or unfit to make decision’s regarding Brett’s health, vocational, recreational, educational or housing needs…the following are guidelines and hopes that they are considered by the remaining members of Brett’s family, conservators and/or special needs trust trustees.

HEALTH: Brett should continue to be seen once a year by his physician and twice a year by his dentist unless he is sick or it’s necessary for him to visit either more often. He then would be seen as often as necessary. Brett has no known allergies.

Should something catastrophic happen to Brett and he is brain dead or quality of life is impaired and/or is unable to be sustained without life support, I believe no unnecessary measures should be used to keep him alive.

Brett should try to maintain a healthy lifestyle with good food choices and physical activities on a daily and weekly basis (no less). Options for physical fitness include but are not limited to Special Olympic sports involvement (bowling, baseball, basketball, tennis) or varying program’s offered through San Jose Parks and Recreation. Through his SVDN day program, Brett goes to the YMCA twice a week to take exercise classes and use the weights and machines.

Brett gets his hair cut once every 6 weeks but needs to have the appointment made for him. Currently, he goes to the Great Clips at Foxworthy and Cherry. They have his file with the proper cut under our phone number (408)269-3130

I am happy to report that Brett has widened his diet to include varied foods like spinach salad, minestrone soup, broccoli, zucchini, Joe’s special, fettucini alfredo, spaghetti to his diet. This helps his bowel movements but he does take a multi vitamin every day. He still will not eat most fruits (will nibble at a grape, banana) and gags on plain scrambled eggs or fried eggs.

VOCATIONAL/COMMUNITY SERVICE: Brett had received vocational coaching from both SCCOE’s vocational program and SJUSD’s vocational program (delivered during school hours). He has worked at Walgreens helping with stocking shelves, The Park Inn as a housekeeper, JoAnn’s Fabric’s (stocking and organizing shelves) and The Gap and Old Navy stores (stocking and organizing). He enjoy’s working and always tries to do as good as he can. He also worked for 4 months at Zanotto’s grocery store in the Rose Garden. This was the only spot that did not seem to be a win-win for the employer or Brett. His immediate supervisor at Zanotto’s had not been reviewed on Brett’s speech and language challenges, therefore many of the directions given to Brett we’re either misunderstood or not heard.

In the future: I feel that Brett would be successful in a retail environment helping with inventory “go backs”, stocking shelves. He also would do well in a office environment helping with filing and shredding etc. He also enjoy’s fixing things and putting things together as well as problem solve creatively. He’s very tenacious and doesn’t give up easily.

Brett also really enjoy’s “big animals” like those found in zoo’s and on farms (think elephants and cows and not dogs or cats!)so he would enjoy either working or volunteering in a similar site.

My hope is that my estate along with SSI has provided Brett with the opportunity to live a comfortable lifestyle that includes part time work and community service.

What I don’t want is for Brett to work in a job that has no meaning for him and is considered “busy” work or containment.

As I stated earlier, my primary concern with Brett working in a “job” is that it would somehow compromise his SSI payments. This needs to be a priority

RECREATION/HOBBIES: I’d like to see Brett continue to enjoy going to the movies, museums, parks, aquariums, trips to the mall, beach, forest, zoo’s, circus at least 3 to 4 times a month for purely recreational outcome. I think that it’s important he have lots of typical peer interaction as well as interaction with the special needs community. He really enjoy’s seeing movies he picks out on the opening day or weekend. He goes to the circus once a year with his aunt, Janet Heaton. He also enjoys going to Christmas in the Park and at least one show of Disney on Ice. Brett enjoys texting his special friends and family on their birthday’s and is able to do this on his own with a reminder. Friends include Gretchen R. (9/22) and Giorgina B. (11/17) and Abbey C. (11/19). He has the phone numbers in his contacts on his phone.

If left to his own choices, Brett would much rather be in his room watching DVD’s or Ipad. He can and will however remain flexible to new idea’s and opportunities. He responds best if given advance notice to his schedule and appreciates having outings or appointments written on his calendar. Ideally, I’d hope that as Brett get’s older, his social circle increases as do his social opportunities.

Currently, the City of San Jose Park and Recreation’s Theraputic Department offer’s a wide variety of social, recreational, fitness and other classes geared for the special needs community. As of yet, we have not participated but feel that this is an avenue we will pursue in the near future.

Brett enjoys taking pictures with his Iphone and also can take pictures and text to people his location in case he gets lost. This may take some verbal prompts to remind him how to do it. But he can do it.

He has also used his phone to take Uber to various destinations but this is not on a regular basis and if re-implemented, will require some adult supervision/assistance. He has the app on his phone and the credit card is my Southwest Visa.

Due to Brett’s difficulty in paying attention and recognizing personal safety, delays etc., we have discovered that Brett is unable to utlize public transportation independently. He also has been unable to utlize VTA Outreach options for transportation due to the fact that the “rider” is responsible for communicating where he needs to go, contacting Outreach if the driver is late or doesn’t show up.

Brett really enjoys eating fast food for lunch on the weekends and during vacations. McDonalds (3 plain cheeseburgers and small fry), Burger Kind (10 pc chicken nugget, small fry), Jack in the box (chicken strips, seasoned curly fries and diet coke no ice) or Wendy’s (chicken nuggets, fries and diet coke no ice)

Brett can and does use a debit card that is in my name (he is unable to have debit card himself as he is conserved). The pin is 3130 which he knows and I make sure that he has 100.00 in it. This is in a separate Chase bank account ending in xx2281. I also give him 20.00 a week allowance.

HOUSING: Currently, Brett resides primarily with myself and spends every other weekend with his father, Derek. In the event of my demise or diminished capacity, my hope is that all the remaining conservators and special needs trust trustee’s and remaining family (Heaton, Wickersham, Cordova) along with Regional Center assistance could develop and secure housing that is appropriate for Brett to remain happy, safe and continue his quality of life. I want that wherever Brett resides that it is his “home” and not just sharing a room. It is a priority that he have his own space with his own things. What I know is necessary for Brett currently to have any chance for happiness in living outside of either family home is that he have his own bedroom that has wi-fi/internet accessibility and have his electronics and dvd’s with him at all times and also that he be allowed to continue to bathe in a bathtub making the necessity of having a tub in whatever home is agreed upon vital. Options for housing include: group housing, supported living, independent living. I have done extensive research regarding possible options for Brett and unfortunately have not found a suitable option. The following would be my ideal situation: Brett in a 2 bedroom/1 bathroom apartment (or shared house). One bedroom for him and another bedroom for a typical suitable responsible roommate (ideally a college student studying psychology, speech and language, occupational therapy etc) or an older retired individual. In exchange for free room and board and utilities, the typical roommate assists Brett whenever needed with grocery shopping, meal prep and house cleaning and errands. A portion of Brett’s social security money will go towards his housing/utilities, therefore increasing his monthly SSI payments.

If there are an questions or concerns in regards to Brett and his future, I believe that between my husband, Joe W., Janet H. (sister), Kathy W. (sister in law), Chad W. (nephew), Derek C. (ex husband) with the assistance of SARC and Parents Helping Parents (particularly, Joanna Jaeger, mentor and friend), options can be developed and agreed upon cooperatively.

Joanne Wickersham 7/7/16