

**WAC 388-101D-0240 Individual financial plan.** (1) The service provider must develop and implement an individual financial plan with client participation when the client's individual support plan:

- (a) Identifies that the client needs support to manage funds; and
- (b) Designates the service provider as responsible for that support; or
- (c) Indicates the service provider manages any portion of the client's funds.

(2) The service provider must obtain signatures from the client and the client's legal representative on the individual financial plan.

(3) The service provider must include the following in the client's individual financial plan:

- (a) Client funds and income managed by the service provider;
- (b) Client funds and income managed by the client and the client's legal representative;
- (c) The type of accounts containing client funds;
- (d) A description of how the client's funds will be spent during a typical month;
- (e) Money management instruction or support provided to the client; and
- (f) If applicable, asset management including such things as personal property, burial plan, retirement funds, stock, and vehicles.

(4) The service provider must review the individual financial plan with the client at least every twelve months.

(5) The service provider must send a copy of each client's individual financial plan to:

- (a) The client's legal representative; and
- (b) The client's case manager upon request.

[WSR 16-14-058, recodified as § 388-101D-0240, filed 6/30/16, effective 8/1/16. Statutory Authority: Chapter 71A.12 RCW. WSR 08-02-022, § 388-101-3530, filed 12/21/07, effective 2/1/08.]