

Documents for Trust Establishment

To Prospective Grantor(s) of Special Needs Trusts:

Please remember to bring the following items when you come to your appointment:

- Government issued photo ID (e.g. driver's license or passport photo) OR copy of birth certificate of the following parties:
 - Grantor(s) (person(s) establishing and funding the special needs trust)
 - Beneficiary (person with disability)
- Social Security Number of the following:
 - Grantor(s)
 - Beneficiary
- Health insurance card(s) of Beneficiary
 - Private
 - Medicaid
 - Medicare
- Letter of Awards from Social Security Administration (SSA) OR most recent letter from SSA, OR a signed and dated physician's statement
- Enrollment fee (\$1050.00) payable by check (made out to Foundation of The Arc of Northern Virginia), credit card, or via an installment plan
- Initial funds: If you wish to fund the trust now, prepare a check payable to Foundation of The Arc of Northern Virginia, with [FF/SF] SNT fbo [Beneficiary's Name] in the memo line
- Contact information (e.g. birth dates, addresses, phone numbers, and email addresses) of the following parties:
 - Grantor(s)
 - Primary Representatives (who are not already serving as Grantors)
 - Remainder Beneficiaries (if the trust is not depleted at time of Beneficiary's death)
- ***Copies of any and all legal documents pertaining to the Beneficiary, including, but not limited to the following:
 - Power of attorney
 - Guardianship court order and certificate
 - Conservatorship court order and certificate
 - Medical directives
 - Other
- ***Copies of insurance policy cover page, last will and testament, and account statements, if applicable

*****Please note that if any of these documents are incomplete or not presented to the Director of Trusts during your appointment, you may be contacted in the future to complete, initial, and date specific documents before the trust can be established.**

Thank you, Tia Marsili, Director of Trusts