

Documents for Trust Establishment

To Prospective Grantor(s) of Special Needs Trusts:

- 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 prior/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