

## Documents for Trust Establishment

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### 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. **Minimum seed money to fund the trust is \$500.**
- 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