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DOCUMENTATION NEEDED FOR ESTABLISHING A TRUST WITH AGED

Please note - if you are unable to provide any of the required information, please include a brief written explanation and/or contact AGED.

Legal Documents

- Joinder Agreement (completed and signed, witnessed, and notarized)
- Fee Agreement (signed and dated)

Required for the Beneficiary

- Driver's License **or** State ID **or** Passport, **or** other form of ID with date of birth
- Social Security card **or** letter from Social Security showing social security number, **or** Form W-9 Request for Taxpayer Id Number (form will be provided upon request)

Optional for the Beneficiary

- Medicare card (red, white, and blue card)
- Other health insurance cards such as Supplemental insurance, HMO, Tri-Care, Medicaid Benefits letter from Social Security

Required for the Beneficiary Advocate and Beneficiary Co-Advocate (if any) named in the Joinder Agreement (NOT required for Successor Beneficiary Advocates)

- Driver's License **or** State ID **or** Passport **or** Military ID, **or** other form of ID
- When a company is named as a Beneficiary Advocate or Co-Advocate, provide a corporate resolution or letter on company letterhead with the names of the individuals allowed to act on behalf of the company in regards to the trust. The letter must be accompanied by a corporate resolution authorizing the signor of the letter to act on behalf of the company.

Required if person establishing the Trust is Attorney-in-Fact or Agent under Durable Power of Attorney (please call our office prior to executing the trust document if using DPOA)

- Durable Power of Attorney document with appropriate language for establishing the trust
- Driver's License **or** State ID or Passport **or** Military ID, **or** other form of ID

Required if person establishing the Trust is a Guardian

- Letters of Guardianship
- Court Order allowing creation and funding of trust
- Driver's License **or** State ID or Passport **or** Military ID, **or** other form of ID

Required if person establishing the Trust is a Parent

- Birth Certificate evidencing they are the parent
- Driver's License **or** State ID or Passport **or** Military ID, **or** other form of ID

Should you have any questions, please feel free to contact AGED at 1-888-277-1826 or 407-682-4111.