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DOCUMENTATION NEEDED FOR ESTABLISHING A POOLED 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 / Required Documents

- Joinder Agreement (completed and signed, witnessed, and notarized; instructions for completing the Joinder available online)
- Fee Agreement (signed and dated)
- DCF Community Partner Release
- (if applicable) Addendum to Joinder (completed and signed, witnessed, and notarized)
- (if applicable) Request for Distribution of Retained Funds/Surplus Trust Property (completed and signed and dated)
- (if applicable) Acknowledgement of Reporting Household Costs Covered by SSI to Social Security (**required for SSI recipients only**)

Required Identification Documents for the Beneficiary

- Driver's License or State ID or Passport or other form of ID with date of birth
- Proof of Social Security Number, such as: Social Security card or letter from Social Security showing social security number or Form 1099. If proof is not available, Form W-9 Request for Taxpayer ID Number will be provided upon request.

Optional Documents for the Beneficiary (preferred but not required)

- Medicare card (red, white, and blue card)
- Other health insurance cards such as supplemental insurance, HMO, Tri-Care, etc.
- Medicaid card
- Medicaid benefits letter
- SSI/SSDI benefits letter

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 regard to the trust. If a letter is provided, it 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 an Agent under Durable Power of Attorney

- Driver's License or State ID or Passport or Military ID or other form of ID
- Durable Power of Attorney document with appropriate language for establishing the trust (please provide to AGED for review prior to executing the trust document)

Required if Person Establishing the Trust is a Guardian

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

Required if Person Establishing the Trust is a Parent

- Driver's License or State ID or Passport or Military ID or other form of ID
- Birth Certificate of Beneficiary, or other document(s), confirming parental rights

Optional AGED Forms

- Available online at www.TrustAGED.org/forms, or upon request.
- Authorization to Disclose Trust Information
- Authorization for Direct Transfer via ACH
- On-line Access Form

Should you have any questions, please feel free to contact AGED at 407-682-4111.