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**DOCUMENTATION NEEDED FOR ESTABLISHING AN
INDIVIDUAL TRUST WITH AGED
(D4A DISABILITY TRUST, 3RD PARTY TRUST, IRREVOCABLE
TRUSTS, NON-POOLED TRUSTS)**

Trust Name: _____

Beneficiary Name: _____

Required 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.
- Beneficiary Information form, completed and signed (form provided by AGED)
- DCF Community Partner Release (not available on-line)
- (if applicable) Beneficiary Advocate: If a beneficiary is a minor or unable or unwilling to act on their own behalf, an individual with proper legal authority to act may be appointed as a Beneficiary Advocate per the Beneficiary Information Form. In this case, provide appropriate legal documents authorizing the Beneficiary Advocate's power to act on behalf of the beneficiary. Examples include Durable Power of Attorney, Letters of Guardianship, or Birth Certificate confirming Parental rights for a minor.
- (if applicable) Acknowledgement of Reporting Household Costs Covered by SSI to Social Security (**required for SSI recipients only**) (form provided by AGED)

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

Optional AGED Forms

Available online at www.TrustAGED.org/forms, or through the office upon request.

On-line Access Form

Authorization to Disclose Trust Information

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