AGED TRUST
Advocates & Guardians for the Elderly & Disabled, Inc.

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www.TrustAGED.org

DOCUMENTATON NEEDED FOR ESTABLISHING THE FL PUBLIC GUARDIANSHIP POOLED TRUST

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)

NOTE: The fee agreement is part of the Joinder Agreement

- ☐ DCF Community and Access Partner Release (AGED Form)
- ☐ (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 (Notice of Case Action From DCF)
- ☐ SSI/SSDI Benefit Verification Letter

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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 regarding 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 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 https://trustaged.org/the-florida-public-guardianship-pooled-special-needs-trust/, or upon request.

- ☐ Authorization to Disclose Trust Information
- ☐ Authorization for Direct Transfer via ACH
- ☐ Online Access Form

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