



rollment Checklist 2018

1st Party

Please acknowledge that the following documents/forms were provided to you:

- Brochure
- Master Trust
- Policies and Procedures Guide
- How To Get Money From SNT
- Spending Plan (Reviewed by SNT Rep post enrollment)
- Letter of Intent (Reviewed by SNT Rep post enrollment)

In order to complete enrollment for the trust, the following documents need to be filled out completely and submitted:

- Notarized Joinder Agreement
- Paid Enrollment Fee made out to “Jewish Los Angeles Special Needs Financial Services Inc.”. If preferred, this fee can be deducted from your sub-account once established.

A copy of the following must also be submitted:

- Current government issued photo ID or Birth Certificate
- Certification of disability or age (such as Social Security Administration Award Letter, physician’s statement, Regional Center correspondence or Consumer #)
- Health insurance ID cards
- Social Security card
- Power of attorney, guardianship, or conservatorship paperwork

I acknowledge that I have received all the documents listed above and have submitted the necessary documentation and funds to open an account with the Jewish Los Angeles Special Needs Trust:

Name of Beneficiary: _____

Name of Legal Representative (if applicable): _____

Signature:

Date:

