



# TRUST ENROLLMENT CHECKLIST 2018

## 3<sup>RD</sup> PARTY

**Please acknowledge that the following documents were provided to you:**

- Brochure
- Master Trust
- Policies and Procedures Guide (Including the JLA Trust Fee Schedule)
- TrueLink and JLA Trust Partnership with Investment Portfolio Options

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

- Joinder Agreement with 12 Month Spending Plan
- Letter of Intent (can be submitted later)
- Distribution Request Form
- SS-4: Application for Employer Identification Number
- Paid Enrollment Fee made out to "Jewish Los Angeles Special Needs Financial Services Inc."

**A copy of the following must also be submitted:**

- Current government issued photo ID or birth certificate
- Certification of disability or age (such as letter of awards, physician's statement, Regional Center correspondence or Consumer #)
- Health insurance ID cards
- Social Security card
- Power of attorney, guardianship, or conservatorship paperwork
- W-9 Forms (for investment income accrued to beneficiary)

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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: \_\_\_\_\_