

Documentation Needed For Establishing a Trust with The Disability Foundation



- Account Agreement
- Beneficiary Profile
- Duties of Personal Representatives Form (*completed and signed by Personal Representative*)
- Memo To Donors Form (*signed by donor*)
- W9 (*Beneficiary*)
- Documentation to demonstrate the beneficiary is disabled (meeting SSI definition)
- Documentation to support authority of Guardian of Estate or Power Of Attorney (*if trust is established/signed by guardian or POA*) *If POA – document must specifically give authority create a trust. **Not needed for third party trust.***