

## Documentation Needed For Establishing a Trust with The Disability Foundation



- Account Agreement (*signature must be signed before 2 witnesses or a notary, unless signed in our office*)
- 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 or Power Of Attorney (*if trust is established/signed by guardian or POA*)