



TRUST ENROLLMENT CHECKLIST

Please acknowledge that the following documents were provided to you or viewed on our website:

- Master Trust
- Policies and Procedures Guide (Including the JLA Trust Fee Schedule)
- Investment Portfolio Options from True Link

In order to complete enrollment for the trust, the following document needs to be filled out completely, notarized and submitted:

- Joinder Agreement

A copy of the following must also be submitted:

- Digital or printed photo, headshot type
- Current government issued photo ID or birth certificate or passport
- Certification of disability or age (such as SSI/SSDI letter of award, physician's statement, Regional Center correspondence or UCI#)
- Health insurance ID cards
- Social Security card (if possible)
- Power of attorney, guardianship, or conservatorship paperwork if appropriate

Optional:

- Letter of Intent

After Enrollment:

- Fillable Spending Plan (can be submitted later)

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: _____