

CLC Foundation, Inc.

New Trust Account Checklist

Please complete this checklist, sign and return it to CLC Foundation, Inc. together with the rest of your new trust account application. Incomplete applications will be returned.

- ___ Review Pooled Trust Agreement with your attorney, advocate or parent.
- ___ Read the CLC Pooled Trust Policies and Procedures prior to submitting your new trust application.
- ___ Complete all sections of the Joinder Agreement. Sponsor must sign the Joinder Agreement in the presence of a Notary Public. Return original signed Joinder Agreement with your new trust application.
- ___ Review Trust Fee Schedule (Schedule A of the Joinder Agreement).
- ___ Ensure all trust deposit checks are made payable as follows:
Third-Party Trusts - **CLC Pooled Trust 1 F/B/O [Insert Beneficiary's Name]**, or
Self-Settled Trusts - **CLC Pooled Trust 2 F/B/O [Insert Beneficiary's Name]**
- ___ Submit a copy of your Social Security Card and State Issued Identification Card.
- ___ Include a copy of your benefits award letter for each of the benefits you receive: SSI, SSDI, SS, etc.
- ___ Submit Court Order approving the trust (if applicable).
- ___ Submit Court Order Appointing Legal Guardian and/or Letters of Guardianship (if applicable).
- ___ Submit Power of Attorney (if applicable).

Date:

Sponsor Signature

Print Name