

Documentation Needed For Establishing a Trust with The Disability Foundation



- € Account Agreement
- € 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*)