

## THIRD PARTY POOLED TRUST

### Submission Checklist

Please ensure that you have completed the items listed below before submitting your application. **Allow a minimum of 21 days for processing.**

- You have read the Information & Procedures Booklet and have reviewed the Trust Agreement with your advocate (POA, Attorney)
- You have answered all of the questions on the Joinder Agreement
- The Joinder Agreement is signed by the appropriate person (the family member setting up the trust) and notarized on page 6
- Contact information for the person who signed the application is enclosed
- You have included a Check or Money order payable to Life's WORC Trusts Services, if trust is being funded at this time.
- You have enclosed a copy of beneficiary's Social Security Card, NYS Identification Card, insurance cards including Medicare, Medicaid and Third Party insurance.
- A copy of your Social Security Disability Award Letter indicating the claim number and the type of benefit the beneficiary receives is included.

**Incomplete Joinder Agreements will not be processed. Please sign below and return this form with your application.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date