

## SELF-SETTLED POOLED TRUST

### Submission Checklist

Please ensure that you have completed the items listed below before submitting your application. **Allow a minimum of 14 days for processing.**

- You have read the Information & Procedures Booklet and have reviewed the Trust Agreement with your advocate (Legal Guardian, Power of Attorney)
- You have answered all of the questions on the Joinder Agreement
- The Joinder Agreement is signed by the appropriate person and notarized on page 6 (*If signed by the guardian or POA you must include a copy of the legal document granting authority. POA **must** specify authority to "establish and fund trust"*).
- Contact information for the person who signed your application is enclosed
- You have included a Check or Money order payable to Life's WORC Pooled Trusts
- You have enclosed a copy of your Social Security Card and NYS Identification Card
- A copy of your Social Security Disability Award Letter indicating the claim number and the type of benefit you receive is included
- You have completed a W-9 Form to verify your social security number

**Please do not include requests for disbursements with your application. Incomplete Joinder Agreements will be returned. Please sign below and return this form with your application.**

\_\_\_\_\_  
Signature

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

\_\_\_\_\_  
Date