

Instructions to Establish an Account:

Complete the Joinder Agreement, Sign and Notarize

Complete ALL questions on the Joinder Agreement (JA). The beneficiary must sign, date, and have the JA notarized. The notarization must be legible and the date must match the signature date.

If you are signing on behalf of the beneficiary, please specify your relationship to the beneficiary that gives you the authority to sign. **Examples include:** *Power of Attorney, Guardian, Parent, Grandparent, or pursuant to a Court Order.*

Mail Original Joinder Agreement and Supporting Documents

The Joinder Agreement is a legal document used to establish the account; therefore, you must mail the original with the required supporting documentation to: **NYSARC Trust Services PO Box 1531 Latham, NY 12110.** You can also send a copy to intake@nysarc.org or by fax to **(518) 439-2670.**

Items currently required to submit an application:

- ✓ Copy of the **beneficiary's Social Security card**
- ✓ Copy of **Social Security Award Letter** (or SSA-1099)
- ✓ If someone other than the beneficiary is signing, you must also submit:
 - Copy of **POA or Guardianship decree**, if signed by agent or guardian
 - Copy of the **Court Order** is required, if established pursuant to a Court Order

Fund the Trust with a Minimum of \$300 (Select One Method: E-Deposit **OR Check Payment)**

Please complete one of the two enclosed forms to fund the trust with a **minimum of \$300.** You do NOT need to complete both forms. Doing so, may result in duplicate payments to the trust and cannot be returned. See form instructions for more details.

- Electronic Deposit – To make a deposit from your checking/savings account, complete the *One-Time Electronic Deposit* section of the Electronic Deposit Form and provide copy of a voided check. You may also complete the *Monthly Electronic Deposit* section if you would like NYSARC to debit this same account in the amount of your regular monthly spend-down deposits once your trust has been established.
- Check Payment – Complete New Account Deposit Slip and make check payable to **NYSARC, Inc. Community Trust fbo [Beneficiary's Name]**. See mailing instructions below and ONLY send deposits to this address.

Mail Electronic Deposit to:

Send the E-Deposit Form with your Joinder Agreement to:

**NYSARC Trust Services
PO Box 1531
Latham, NY 12110**

Mail Check Payment to:

Mail New Account Deposit Slip and check directly to the bank:

**NYSARC, Inc. Community Trust
PO Box 1788
Albany, NY 12201-1788**

If you have any questions or you would like assistance completing an application, please contact customer service at (518) 439-8323.