

Instructions to Establish an Account:

Complete the Joinder Agreement, Sign and Notarize

The Donor must complete the Joinder Agreement to establish the trust, even if they intend to fund the trust at a later date. The Donor must sign, date, and have the Joinder Agreement notarized.

If you are signing on behalf of the donor, please specify your relationship to the donor that gives you the authority to sign. The notarization must be legible and the date must match the signature date.

Mail Original Joinder Agreement and Supporting Documents to NYSARC

The Joinder Agreement is a legal document used to establish the account; therefore, you must mail the original to **NYSARC Trust Services PO Box 1531 Latham, NY 12110** and include the required supporting documentation.

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
- ✓ Copy of **Trust of Donor** if directing funds to the trust at death
- ✓ Copy of **Beneficiary Designations** if trust is funded by life insurance policy, retirement accounts, employee benefits, etc.
- ✓ Any other required documentation requested by NYSARC

Fund the Trust (Select One Method: *Electronic Deposit* OR *Check Payment*)

The Donor must deposit a **minimum of \$10,000** or pay the one-time enrollment fee to establish the account without funding. Please complete one of the two (2) enclosed forms to make your initial deposit to fund the trust. You do NOT need to complete both forms. Doing so, may result in duplicate payments to the trust and cannot be returned. See each form's 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 a copy of a voided check.
- Check Payment – Complete New Account Deposit Slip and make check payable to **NYSARC, Inc. Third Party Community Trust fbo [Beneficiary's Name]**. See mailing instructions below and ONLY send deposit checks 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**

ONLY send checks to this address:

Mail the 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.