

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 signature authority. **Examples include:** *Power of Attorney, Guardian, Parent, Grandparent, or pursuant to a Court Order.*

Submit Joinder Agreement and Supporting Documents

Send JA and supporting documents to NYSARC for review and approval. Email to intake@nysarc.org fax to **(518) 439-2670**, or mail to **NYSARC Trust Services PO Box 1531 Latham, NY 12110**.

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 **Letters of Guardianship**, if signed by agent or guardian
 - Copy of the **Court Order** is required, if established pursuant to a Court Order
- Note:** Powers of Attorney executed before September 2010, must also provide an Affidavit of Full Force and Effect.

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 a 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.

Send Electronic Deposit to:

Email E-Deposit form to intake@nysarc.org with your Joinder Agreement or mail 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**

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