



Friends & Family Trust

As part of your application process, please be sure you have completed everything on the checklist below and return this sheet with your application.

- _____ I have read the *Frequently Asked Questions* information relating to Trust.
- _____ The application has been completed.
- _____ All required attachments are included.
- _____ The Joinder Agreement has been signed and notarized by beneficiary or beneficiary’s legal representative. *(If signed by a Guardian or POA, you must enclose a copy of the legal document granting authority. POA must grant specific authority to “establish and fund trust”).*
- _____ Contact information of the individual knowledgeable in Medicaid law, assisting you with your application, or contractual relationship, is required.
- _____ Proof of the Beneficiary’s disability is included.

Signature of Donor/Guardian or POA

Relationship to Beneficiary

Date