



### Under 65 Trust Check List

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
- \_\_\_\_\_ 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.
- \_\_\_\_\_ A Medicaid spenddown letter with spenddown amount included has been provided.

\_\_\_\_\_  
Signature of Donor/Guardian or POA

\_\_\_\_\_  
Relationship to Beneficiary

\_\_\_\_\_  
Date