PLAN of CT
D4a (Self Settled) Checklist

1. Trust Adoption Agreement (Choice D)
   - Please leave items 3 and 4 blank
   - Please ensure that the TAA is initialed where indicated
   - Date the document when it is signed by the Grantor

2. Personal Care Plan (PCP)
   - 13 page document

3. Proof of Disability
   - Disability determination letter from Social Security or
   - SSD payment stub or proof of direct deposit

4. Proof of guardianship, conservatorship or PLAN Release document
   - If someone else will be making requests on behalf of the client

5. If established by a conservator
   - Court decree stating the conservator can establish and fund the trust

6. $1,050 PLAN of CT establishment fee

The PLAN of CT Trust Committee meets the 2nd Thursday every month to approve trust documents.

Revised: 4/2015