

## 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 2<sup>nd</sup> Thursday every month to approve trust documents.

Revised: 4/2015