

SURPLUS INCOME TRUST

(For Excess Income Only)

Submission Checklist

Please ensure that you have completed the items listed below before submitting your application. **Allow a minimum of 14 days for processing.**

- You have read the Information & Procedures Booklet and have reviewed the Trust Agreement with your representative (Advocate, Legal Guardian, Power of Attorney).
- You have answered all of the questions on the Joinder Agreement.
- The Joinder Agreement is signed by the appropriate person and notarized on page 6 (*If signed by the guardian or POA you must include a copy of the legal document granting authority. POA **must** specify authority to "establish and fund trust"*).
- Contact information for the person who signed your application is enclosed.
- You have included a Check or Money order payable to Life's WORC, Inc. Surplus Income Trust. The minimum amount required to open a Surplus account is \$300.00.
- You have enclosed a copy of your Social Security, Medicaid/Medicare Card, other insurance cards.
- You have enclosed a copy of your Photo Identification.
- You have included a copy of your Medicaid Notice of Decision (which specifies the amount of your spend down).
- A copy of your Social Security Award Letter indicating the claim number and the type of benefit you receive is included.
- Verification of all forms of current income including SSA retirement benefits, pension, etc.
- You have signed and enclosed the W-9 tax form.**

Please **do not** include requests for disbursements with your application. Incomplete Joinder Agreements will be returned. Please sign below and return this form with your application.

Signature

Print Name

Date