

EXHIBIT "A"
SPECIAL NEEDS TRUST ADMINISTRATION

PLEASE BRING THE FOLLOWING DOCUMENTS WITH YOU AND WE WILL COPY THEM HERE DURING YOUR APPOINTMENT:

- 1. TRUST AGREEMENT (INCLUDING ANY COURT ORDER AUTHORIZING THE TRUST TO BE CREATED).**
- 2. TRUST AMENDMENTS.**
- 3. DEED AND CURRENT TAX BILL FOR HOME AND ANY OTHER REAL ESTATE TRUST OWNS.**
- 4. CAR TITLE/VEHICLE REGISTRATION AND INSURANCE POLICY FOR ALL AUTOMOBILES OWNED BY THE TRUST.**
- 5. STOCK CERTIFICATES OR RECENT STOCK STATEMENTS FOR STOCKS OWNED BY THE TRUST.**
- 6. MORTGAGE PAPERS (if the trust owns real estate).**
- 7. RECENT BANK STATEMENT FOR ALL BANK ACCOUNTS OWNED BY THE TRUST.**
- 8. LIFE INSURANCE POLICIES OWNED BY THE TRUST.**
- 9. COURT ORDER APPOINTING GUARDIAN FOR ANY TRUST BENEFICIARY.**
- 10. POWER OF ATTORNEY FOR THE GRANTOR AND ANY TRUST BENEFICIARY WHO IS INCAPACITATED.**
- 11. DOCUMENTATION ESTABLISHING PUBLIC ASSISTANCE (I.E. MEDICAID; SUPPLEMENTAL SECURITY INCOME; SOCIAL SECURITY DISABILITY INCOME; HUD HOUSING; FOOD STAMPS) RECEIVED BY A TRUST BENEFICIARY.**
- 12. LAST WILL AND TESTAMENT; DESIGNATION OF HEALTH CARE SURROGATE; LIVING WILL FOR THE SURROGATE.**
- 13. DEATH CERTIFICATE (of the trust beneficiary).**
- 14. COPY OF THE LAWSUIT CLOSING STATEMENT.**

****** If you are the surviving spouse we recommend that you also bring your legal documents (i.e. Last Will & Testament, Trust Agreement, Durable Power of Attorney, Designation of Health Care Surrogate, Living Will) to your appointment so that we may review them and counsel you about whether they need to be updated due to either changes in the law or, the passing of your spouse.**