

Special Needs Trust Foundation

P. O. Box 1890



Lakeside, CA 92040



(619) 201-2672

March 2015

Dear Parent/Conservator:

Thank you for your interest in the Special Needs Trust Foundation (SNTF). The Foundation was developed to assist individuals with special needs living in San Diego County. By establishing a special needs trust, participants are allowed to supplement their monthly income from SSI with no adverse effects. The use of these funds is restricted by government regulation and must be utilized to pay for goods and services that would not normally be paid for by SSI or MediCal.

Attached please find a copy of the **3rd Party Master Trust, Joinder Agreement, and Limitations Disclosure**. **These documents are to be completed and submitted to the Special Needs Trust Foundation Board in order to be considered for a trust. At the time that you submit these documents, please include a complete copy of your living trust, life insurance policy, and/or other document(s) that pertain to funding the special needs trust.** Please note that the Foundation charges a one-time enrollment fee of \$100 for each new Joinder Agreement approved by the Board. Following review of the Agreement, you will be notified of the Board's decision, and if applicable, the enrollment fee will be due at this time. At the time of enrollment, we also require that you fund the trust with a \$10.00 (cash) bill. This will establish the trust and the money will be kept with your Joinder Agreement until the future funding arrives.

A requirement of the Joinder Agreement is to designate the Special Needs Trust Foundation **and** a member charitable organization(s) to **each** receive a minimum of at least twenty-five (25%) of the remaining assets following the death of the person with special needs. Please see Section F of this Agreement. The Special Needs Trust Foundation member charitable organizations are:

- Access to Independence
- The Arc of San Diego
- Community Catalysts
- Developmental Services Continuum
- Home of Guiding Hands
- NAMI San Diego
- Partnerships With Industry
- Sharp Healthcare Foundation
- St. Madeleine Sophie's Center
- Stein Education Center
- United Cerebral Palsy Assoc. of San Diego
- Unyeway, Inc.

Please mail the completed Joinder Agreement and Limitations Disclosure to the:

Special Needs Trust Foundation
12515 Woodside Ave. #1890
Lakeside, CA 92040

A minimum of \$5,000 is needed to establish a 3rd Party special needs trust with the SNTF. When the funds are placed into the 3rd Party SNT, they are irrevocable and will only be distributed according to the Joinder Agreement that you established. Please refer to your attorney and to the 3rd Party Master Trust for more information on funding, disbursements, and termination of special needs trusts.

If you have any questions regarding this Agreement, or would like further information on the Special Needs Trust Foundation, please call us at (619) 201-2672 or visit our web site www.sntf-sd.org. Thank you.

Sincerely,
Prudence Dumon
President, Special Needs Trust Foundation