

PYF SUBMISSION CHECK LIST

As part of your application process, please be sure you have completed everything on the checklist and return this sheet along with your Beneficiary Background and Joinder Agreement.

(Please initial)

- You have read the Policy and Procedures pertaining to the trust program and understand its contents.

- The Background Information and Joinder Agreement is accurate and complete to the best of your knowledge.

- You have provided the contact information of the individual who will be the main point of contact.

- You have provided the contact information of the agency that will be submitting the trust to Medicaid.

- The Joinder Agreement is signed and dated by the beneficiary or authorized individual. (Please note: If signed by a Power or Attorney or Guardian please enclose a copy granting authority. Trusts will not be processed without those documents and will delay the approval *including Statutory Gift Rider for any POA executed after Sept. 1, 2009*)

- The Joinder Agreement is notarized and dated.

- You have enclosed a copy of your Social Security Card.

- You have enclosed a copy of your Social Security Award letter, indicating type of benefit received and claim number. (If letter is pending, you will provide it to PYF as soon as it is available).

- You have enclosed a copy of any existing funeral arrangements if applicable.

- You have enclosed a copy of life insurance policy if applicable.

- You will notify PYF if there are any changes in the Monthly Surplus amount.

- You will notify PYF about any transfers off of Community Medicaid.

- You will notify PYF about the death of the beneficiary.

- You have filled out the Electronic Funds Transfer forms for monthly disbursements (Only applicable if choosing this option of disbursement. Checks can also be mailed in.)

SIGNATURE

DATE