

CHECKLIST

SPECIAL NEEDS TRUST

Initial Filing Fee:

Court Costs: \$120.00

Requirements:

An Attorney is required.

E-Filing Process:

When the following documents are accepted by the Court, the Court will contact the applicant to set a hearing for the Trustee to appear in the Probate Court to (a) sign the Oath, (B) execute the trust, and (C) receive Letters.

If the funding for the trust is being received from or through a guardianship for the beneficiary, then additional proceedings may be required in a guardianship case, or an action to dispense with a guardianship.

Checklist:

Application for Appointment of Trustee (DCPC Form)

Next of Kin (Form 15.0)

Instructions for Service (DCPC Form 1.1A)

Waiver and Consent

Record Check Authorization, Waiver and Consent (DCPC Form 17.10)

Non-Public Record Social Security Information (DCPC Form 17.11)

Trustee's Acceptance

Copy of Picture ID of the Applicant

Copy of the proposed Special Needs Trust in unsigned DRAFT form; (the trust must comply with Local Rule 78.7)

Bond (if applicable)