



Notify your Case Manager you are ready for a Signing	<ul style="list-style-type: none"><li>• Please let your CPT Case Manager know when you're ready to proceed with the signing. Please send the following to your CPT Case Manager:</li><li>• A photo copy of your Driver's License</li><li>• A photo copy of your signed Social Security Card</li><li>• Print &amp; Fill in this form</li></ul>
Book a Signing Meeting	<ul style="list-style-type: none"><li>• Your CPT Case Manager will help you schedule a 45-minute signing session. Ensure your witness, who must be 18 years or older, is available at this time. Please provide your CPT Case Manager with your witness's contact information, including their email and phone number. If you cannot access a witness, please be prepared to sign in front of a notary following the appointment.</li></ul>
Watch Signing Video	<ul style="list-style-type: none"><li>• Your CPT Manager will send you a detailed email to help you prepare for your signing. Don't forget to watch our Signing Video to ensure you're fully prepared for the meeting. <a href="https://www.cptinstitute.org/cpt-signing-video/">https://www.cptinstitute.org/cpt-signing-video/</a></li></ul>
Receive Signing PDF	<ul style="list-style-type: none"><li>• You will receive a pre-filled trust document for your signing. Please review the following:</li><li>• Ensure all pre-filled information is correct and accurately spelled. Confirm that your name matches the one on your Social Security Card provided to your CPT Case Manager.</li><li>• Print your trust documents for the signing.</li><li>• Read through the Master Trust Document and Disclosure Agreement.</li></ul>
Attend Signing Meeting	<ul style="list-style-type: none"><li>• You and your witness will attend your scheduled signing session with your CPT Case Manager. They will guide you through the trust document and address any questions you may have regarding your trust account.</li></ul>
Send Signing Docs to your Case Manager	<ul style="list-style-type: none"><li>• After signing the trust document, please send a copy to your CPT Case Manager. Please save a copy for your records.</li></ul>



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## How to Send my Case Manager or Trust Administrator a Printed Document?

In Order of Preference:

1. Use a scanning app (e.g., CamScanner) and email the scanned document to your CPT Case Manager at [help@cpttrust.org](mailto:help@cpttrust.org). If you have an Apple iPhone, you can utilize the scanner function in your Notes app. Refer to this resource for guidance: <https://support.apple.com/en-us/HT210336>.
2. Utilize a physical scanner to scan the document and email it to your CPT Case Manager at [help@cpttrust.org](mailto:help@cpttrust.org).
3. Fax a copy of the document to **619-431-1997**.
4. Send a picture copy of the document you want to send. Ensure that your picture is clear, straight, and legible before emailing it to your CPT Case Manager or [help@cpttrust.org](mailto:help@cpttrust.org).



## Electronic Trust Document Signing Procedures



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<p>Book a Signing Meeting</p>	<ul style="list-style-type: none"> <li>• Your CPT Case Manager will help you schedule a 45-minute signing session. Ensure your witness, who must be 18 years or older, is available at this time. Please provide your CPT Case Manager with your witness's contact information, including their email and phone number.</li> </ul>
<p>Watch Signing Video</p>	<ul style="list-style-type: none"> <li>• Your CPT Manager will send you a detailed email to help you prepare for your signing. Don't forget to:             <ul style="list-style-type: none"> <li>• Watch our Signing Video to ensure you're fully prepared for the meeting <a href="https://www.cptinstitute.org/cpt-signing-video/">https://www.cptinstitute.org/cpt-signing-video/</a></li> <li>• Read through the Master Trust Document and Disclosure Agreement COPY.</li> </ul> </li> </ul>
<p>Attend Signing Meeting</p>	<ul style="list-style-type: none"> <li>• You and your witness will join your scheduled signing session with your CPT Case Manager. They will provide guidance on the trust document and address any questions you may have regarding your trust account.</li> <li>• At the time of your signing, your CPT Representative will email you and your witness a RightSignature link for electronic signing.</li> <li>• Please ensure that all pre-filled information is correct and accurately spelled. Confirm that your name matches the one on your Social Security Card provided to your CPT Case Manager. If any information is misspelled or incorrect, your CPT Rep will resend you and your witness a new link. To avoid confusion, please delete or disregard the previous link with the incorrect trust documents.</li> <li>• Follow the red flags on RightSignature and sign all the required sections. Both you and your witness must sign all documents on the same date. Otherwise, you will need to conduct another signing at a more suitable time.</li> <li>• Please note: If the signing dates are two different dates this is an invalid document and a new signing will need to be conducted.</li> </ul>
<p>Signing Completed</p>	<ul style="list-style-type: none"> <li>• You and your witness will attend your scheduled signing session with your CPT Case Manager. They will guide you through the trust document and address any questions you may have regarding your trust account.</li> </ul>