



Enrollment Procedure

Step 1

Obtain Enrollment Documents

Contact CPT Institute to request the current Third Party Pooled Special Needs Trust enrollment package, which includes:

- Disclosure and Acknowledgement to Join CPT Institute
- Beneficiary Advocate Acceptance of Duties (if applicable)
- Joinder Agreement with Schedules A and B
- Additional Service Fees acknowledgment
- Schedule C: Intake Information and Remainder Beneficiary Designation
- Notary acknowledgment page
- Master Trust Agreement

Step 2

Complete Enrollment Documents

Gather the following information and complete all forms:

- **Trust Beneficiary:** Full legal name, date of birth, Social Security number, physical address, contact information, description of disability, and current benefits (SSI, SSDI, Medicaid, Medicare, Section 8).
- **Beneficiary Advocate:** Name, address, contact information, and relationship to beneficiary.
- **Emergency Contact:** Name, address, and contact information.
- **Remainder Beneficiaries:** Primary and contingent beneficiaries with names, addresses, Social Security numbers, percentages, and per stirpes elections.
- **Funding Information:** Source of funds and approximate amount.

Have the Grantor execute all documents. Notarize the Joinder Agreement.



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CPT Third Party Pooled Special Needs Trust

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Step 3

Submit to CPT Institute

Submit the completed enrollment package to CPT Institute for review and approval. Upon approval, the CPT Director will sign the Joinder Agreement.

**The trust is established as of the date the CPT Director
executed the Joinder Agreement.**

Step 4

Update Estate Planning Documents

Amend the Grantor's will or living trust to direct the beneficiary's share to the pooled trust. Reference the trust as follows:

CPT Institute, Trustee of the CPT Third Party Pooled Special Needs Trust f/b/o [Beneficiary's Full Legal Name], dated [Date CPT Director Signs Joinder Agreement]

Sample Distribution Language:

The Trustee shall distribute [Beneficiary's Name]'s share to CPT Institute, Trustee of the CPT Third Party Pooled Special Needs Trust f/b/o [Beneficiary's Full Legal Name], dated [Date], to be held and administered in accordance with the terms of that trust for the purpose of preserving [his/her] ongoing eligibility for means-tested government benefits.



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Step 5

Funding

The trust may remain unfunded until the Grantor's death or other funding event. Upon funding:


1. Contact CPT Institute to initiate the transfer
2. CPT Institute establishes the account in its system
3. CPT Institute collects the setup fee from the initial deposit
4. Active administration begins

Any third party may contribute funds to the account at any time.

Key Points

- Trust Date: The subaccount is established as of the date the CPT Director signs the Joinder Agreement, not the funding date
- No Medicaid Payback: Remaining funds pass to designated remainder beneficiaries
- Disbursements: Must be for beneficiary's benefit, payable to third parties, and supported by documentation

Contact CPT Institute

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