



Thank you for your interest in completing the final step for enrollment in the Washington State Developmental Disabilities Endowment Trust Fund.

This packet includes enrollment instructions, the Master Trust documents, and the Joinder Agreements. Contact information is listed below. Please note that you are only responsible for one set of legal documents.

Please review the two types of trust accounts offered by the Endowment Fund prior to making your final decision.

**TRUST I** A Third Party Individual Trust Account will accept contributions of funds that belong to anyone other than the beneficiary.

**TRUST II** A Self-Settled Individual Trust Account will only accept contributions of funds that belong to the beneficiary. If the beneficiary of a Self-Settled Individual Trust Account dies and there is a remaining balance, the State is entitled to recover dollar for dollar for medical care and long-term services.

The “Joinder Agreement” is the legal document you complete to establish an Individual Trust Account within the Washington State Developmental Disabilities Endowment Trust Fund. You will need to provide some basic information about the beneficiary and your wishes for how the disbursements will be used.

Please seek independent professional advice regarding the implications of establishing an individual account, as this is an irrevocable trust.

To complete the enrollment process you have two options: you can mail them to us here in Olympia, or set-up an in-person appointment. It is also possible to set up a telephone consultation if you have questions. Also, if your contact information changes, please notify us.

Again, we encourage you to contact us if you have any questions or concerns. Our goal is to make this process as easy as possible for you.

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