



CHECKLIST

Medicaid Payback Trust (*funded with beneficiary's assets*)

BEFORE SUBMITTING YOUR DOCUMENTS TO ESTABLISH AN ACCOUNT WITH ALABAMA FAMILY TRUST (AFT), MAKE SURE YOU HAVE INCLUDED ALL OF THE FOLLOWING:

- Irrevocable Agreement Alabama Family Trust / Medicaid Payback Trust as completed in full with original signatures (not scanned, faxed, etc.). AFT will fill in the date. If the agent under an Alabama durable power of attorney is executing the trust and the power of attorney was executed on or after January 1, 2012, then the power of attorney must include specific language that gives the agent the power to execute a trust on behalf of the principal of the power of attorney. Language that generally gives the agent the power to execute an inter vivos trust or that specifically gives the agent the power to execute a special needs trust is acceptable.
- If you are not the Settlor– Photocopy of Power of Attorney, Letters of Guardianship, Letters of Conservatorship or other court order establishing your authority to open the trust on behalf of the Settlor
- Investment Options Agreement with original signatures. Select one of the 5 options listed on page 1, and on page 2, initial A or B as well as C and D, then sign and have signature witnessed on page 3. AFT will fill in the date.
- Form W-9 from the IRS completed on behalf of the Life Beneficiary
- Confidential Information Form completed in full
- Physician's letter or other evidence of the Life Beneficiary's medical impairment
- Photocopy of Co-Trustee's government-issued identification card (Drivers License, passport)
- Check to Alabama Family Trust for at least \$1500.00, with Life Beneficiary's name written in the lower left corner of the check

For your own records we suggest you keep a copy of everything being submitted.