

Application Packet Checklist

We encourage you to use this checklist when preparing your application packet for submission to the OSNT. Sending a complete package will help us to establish your new subaccount without delays caused by missing or incorrect information.

- Original Joinder Agreement (1st or 3rd party as is appropriate)
- Social Security award letter
- Verification of Medicaid/OHP and/or Medicare benefits
- Verification of any other public benefits being received by the beneficiary
- ISP or Treatment Plan
- Verification of the source of funds being deposited, e.g.
 - Living Trust or Will
 - Injury or other legal settlement award
 - Social Security back payment award letter
- Copy of beneficiary's photo ID or birth certificate
- Copy of beneficiary's Social Security card
- Guardianship or Conservatorship documentation (if applicable)
- Power of Attorney (if applicable)
- Court Order
 - Required for any beneficiary funded account where the beneficiary is not competent to enter into an irrevocable legal agreement
- Copy of any Funeral Trust plan or other arrangements already in place
- Check for enrollment fee payable to "The Arc Oregon" or written authorization to deduct payment of enrollment fee from initial deposit.
- Check for initial deposit payable to "The Arc Oregon FBO Beneficiary's Name"