



# STEPS TO ESTABLISHING A COMMUNITY TRUST ACCOUNT

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- 1** Complete the Enrollment Application (Joinder Agreement) in full, sign, date, and have the document notarized.
- 2** If signed by Guardian or POA, a copy of the legal document granting authority, must be included.
- 3** Include any necessary supporting documentation.
  - Copy of Beneficiary's Social Security Card
  - Copy of Beneficiary's Social Security Award Letter or SSA-1099
  - Disability determinations received from SSA or NYS Medicaid
  - If the Beneficiary has a POA or Guardian, submit supporting paperwork
  - If the account creation is due to a court order, submit a copy of the court order
- 4** Submit the Enrollment Application (Joinder) and supporting documentation
  - Either by mail to:  
My Choice Trust Services, 258 Genesee St., Mezzanine Level, Utica, NY 13502
  - Or email to: [Intake@mychoicetrust.org](mailto:Intake@mychoicetrust.org)
- 5** Once we receive the packet, a trust representative will reach out to you for next steps.

*Deposit slips can be found in the Documents section of our website [www.MyChoiceTrust.org](http://www.MyChoiceTrust.org).  
If you would like any documents mailed to you, please call Customer Service at 1-866-427-3575.*