



# Developmental Disabilities Life Opportunities Trust

## Washington State Developmental Disabilities Endowment Trust

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.

We encourage you to access our website: [www.arcwa.org](http://www.arcwa.org), click on the “Endowment Trust” link and select the “Planning Calculator” option. This will access our new financial planning calculator that will help you to calculate different contribution and disbursement plans for your trust account. If you do not have access to the Internet, please contact us for assistance in using this great planning tool.

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.

Patti Bell  
Endowment Trust Fund Manager  
1-888-754-8798, ext. 103  
[patti@arcwa.org](mailto:patti@arcwa.org)

Samantha Trotter  
Endowment Trust Fund Assistant  
1-888-754-8798, ext. 106  
[samantha@arcwa.org](mailto:samantha@arcwa.org)

**The Arc of Washington State**  
2638 NE State Ave ♦ Olympia, WA 98506  
**Phone: 360.357.5596 ext. 103 or 106 ♦ Toll-free: 1.888.754.8798 ext. 103 or 106 ♦ Fax: 360.357.3279**  
**Email: [patti@arcwa.org](mailto:patti@arcwa.org) or [samantha@arcwa.org](mailto:samantha@arcwa.org) ♦ Website: <http://www.arcwa.org>**

## **ENROLLMENT INSTRUCTIONS AND INFORMATION**

1. Please review all of the documents.
2. Complete the Joinder Agreement for the type of trust account that you have chosen. This is the legal document you will complete to establish an Individual Trust Account. You are encouraged to seek independent professional advice before signing. Please note that you need to have your signature **notarized** on this document.
3. Contact the Division of Developmental Disabilities to request a letter stating the person for whom the trust account is being opened is eligible to receive DD services. A contact list of the regional offices was included in your informational packet. You may already have a letter stating this information. We only need a copy of the letter or it may be faxed to The Arc of Washington State (Attn: Patti or Samantha) at 360-357-3279.
4. When you send in the Joinder Agreement and DDD letter, you will also need to pay the enrollment fee of \$600.00. We ask you to do this by preparing a check made payable as follows:

One check for:     \$600.00 made payable to **Endowment Trust Fund**

Again, please submit the Joinder Agreement signed and notarized, along with a copy of the letter from the Division of Developmental Disabilities and enrollment fee check to:

The Arc of Washington State  
Developmental Disabilities Endowment Trust Fund  
2638 NE State Ave  
Olympia, WA 98506

5. After we have completed processing your enrollment we will send you an envelope filled with deposit slips, address labels, disbursement request forms and a copy of your completed Joinder agreement.