

# *Steps For Accessing PLAN of Maryland-D.C., Inc. Services*

## **To access any PLAN services complete steps 1 and 2 below.**

1. Become a member of PLAN
  - a. Fill out short application form located on the bottom of the “Who Are We” sheet
  - b. Complete Contract for Services
  - c. Complete Client Information Form
  - d. Submit annual membership fee of \$130
2. Work with a Clinical Case Manager to develop a Personal Plan of Care
  - a. Family meeting with case manager
  - b. Client / beneficiary meeting with case manager
  - c. Plan of care developed and reviewed with Personal Plan Review Committee and the Family

## **To set up a special needs trust complete steps 1 and 2 above and steps 3 through 8 below.**

3. Make key decisions about the trust
  - a. Select a Trust Protector
  - b. Select a “Next Friend”
  - c. Decide what will happen with any funds remaining at the death of the beneficiary.
4. Apply for inclusion in the trust
  - a. Complete trust application
  - b. Submit application fee of \$500
  - c. Provide copies of the existing trust, will, or other key documents
  - d. If joining PLAN’s Master Discretionary Trust draft Joinder Agreement
5. Have Joinder Agreement and your Will reviewed by your personal attorney.
6. Meeting with the Trust Committee
  - Discussing your intentions for the use of the trust funds
7. Signing the Joinder Agreement or  
PLAN’s acceptance of role of Trustee of non-PLAN Trust
8. Funding the trust – Funding now or through your Will