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. Submit annual membership fee of $130
2. Work with a Clinical Case Manager to develop a Personal Plan of Care
    a. Complete Contract for Services
    b. Complete Client Information Form
    c. Family meeting with case manager
    d. Client / beneficiary meeting with case manager
    e. 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 7 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. Meet with the Trust Committee
    -Discuss your intentions for the use of the trust funds
    -Sign the Joinder Agreement or PLAN's acceptance of role of Trustee of non-PLAN Trust
7. Fund the trust now or upon passing of Settlors. Meet with your attorney to ensure that your estate planning documents (wills, trusts, life insurance, account beneficiary forms, etc) work together to ensure a smooth transition of assets earmarked for the beneficiary's care to the PLAN Trust.

10/15/2020