

LAW OFFICES OF
LARRY E. CIESLA

SPECIAL NEEDS TRUST CHECKLIST

1. Full name of beneficiary.
2. Birth date of beneficiary.
3. Social security number of beneficiary.
4. Address of beneficiary.
5. Description of beneficiary's family situation (minor child; single adult; married adult).
6. If the beneficiary is a minor, full names of both parents.
7. If the beneficiary is married, full name of spouse.
8. If the beneficiary is married, full names, ages and birth dates of any children.
9. Is the beneficiary a citizen of the United States?
10. If the beneficiary is a minor, are the beneficiary's parents citizens of the United States?
11. Names and ages of all other individuals living in the same household with the beneficiary.
12. If the beneficiary is not living at home, where does the beneficiary reside?
13. If the beneficiary resides in an institutional setting, provide the name, address, telephone number, name of contact person, date of admission and level of care being received by the beneficiary.
14. If a lawsuit has been filed, provide a copy of the complaint.
15. If a guardianship has been initiated, provide a copy of all guardianship pleadings.
16. Guardian's name, address and telephone number.
17. Guardian ad litem's name, address and telephone number.