



INSTRUCTIONS TO ATTORNEYS PRIOR TO FILING A PETITION WITH THE COURT

If your matter requires Court approval to join the Special Needs Trust Foundation, please complete the following steps **prior to** filing your petition with the Court.

1. Fully review each document with your client.
2. Upon completion of the packet, return the **unsigned** Joinder Agreement to the Special Needs Trust Foundation for consideration by the First Party Joinder Committee. The Joinder Agreement may be emailed to Meredith Adams, Executive Director, at meredith@sntf-sd.org. You will send the signed Joinder Agreement and Limitations Disclosure after Court approval.
3. You will be notified as soon as possible regarding acceptance of the Joinder Agreement. Please do not file your petition until confirmation that the Joinder Agreement has been approved.
4. Upon Court approval of the Special Needs Trust, send the original “wet” signature Joinder Agreement, Limitations Disclosure, Minute Order or complete Court Order, along with the funding check when ready to:

Special Needs Trust Foundation
353 E. Park Ave., Suite 101
El Cajon, CA 92020

The funding check should be made payable to **[Name of Beneficiary]** Special Needs Trust.

5. After your Joinder Agreement has been approved by the SNTF, you may file your petition. Please email Meredith Adams, the signed Minute Order or Full Court Order upon approval.

**INQUIRE AS TO ADDITIONAL STEPS THAT MAY BE REQUIRED
IF THE MATTER INVOLVES A STRUCTED SETTLEMENT OR AN
MSA.**