



COMMUNITY FUND OHIO

Protect the Present, Fund the Future
The Special Needs Trust Advisor Since 1993

How to Set up a Trust with Community Fund Ohio

- Visit Community Fund Ohio's website to find out more about our Trusts.
- Contact an attorney for assistance. Community Fund Ohio provides the Trust documents, but your attorney must complete and sign them. Setting up a Trust is an important financial step that could have legal and tax consequences. An attorney must advise you on whether a Community Fund Ohio Pooled Special Needs Trust is the right option.
- Make sure you understand that the Trust funds are invested and the Trust has annual and monthly fees.
- Select a Designated Advocate (such as a family member or service provider) who will handle communications, request money from the Trust for purchases, and receive account and tax statements.
- Determine how and when to fund the Trust. Your attorney can advise you on funding the Trust during your lifetime or in the future through life insurance or your estate plans.
- Submit the signed Trust documents to Community Fund Ohio, along with the set-up fee.