



# Completing the Joinder Agreement Online

- ❖ You are now able to complete the joinder agreement, upload guardianship and power of attorney documents, and submit payment online.
- ❖ On the landing page, you will see the option to choose between Trust I and Trust II. You can also resume filling out a joinder agreement that was previously started.
- ❖ To begin, please select the type of trust you will be enrolling in. If you are unsure and need assistance, please contact The Arc Master Trust Office by calling 317.977.2375/800.382.9100.
- ❖ You will be guided through the joinder agreement with different prompts.
  - About You – contact information about the person filling out the joinder agreement.
  - Beneficiary Information – contact information, guardianship/POA, disability/diagnosis and benefit information.
    - You can upload guardianship/POA documents in this module.
    - Many of the fields are required. You will not be able to move forward without the information. This ensures that the joinder agreement is fully complete.
  - Funding – for the initial funding of the account, where is this money coming from?
  - Key People – list of key people for the account.
    - If the key person is from a provider agency, there is an area for the agency information.
    - If an email address is provided, they will be automatically enrolled in on-line access.
    - Add more key people by pressing Add Another Key Person at the bottom of the page.
  - Remaindermen – individual or non profit
  - Upon approval of this application, who should receive the welcome packet? Choose either the beneficiary or a key person to receive a welcome packet.
  - If there are questions about this application, who should be contacted? Choose an individual that The Arc trust staff may reach out to with questions on the joinder agreement.
  - Signature –The authorized signer can type their name in the box to officially sign the joinder agreement.
  - Submit. You will receive a confirmation email that your joinder agreement has been successfully submitted.
- ❖ In order to fund your account, you can make a payment online or send in a check. We will hold on to your joinder agreement until the funding has arrived. In your confirmation email, there are instructions on how to fund the account.
- ❖ After the funding has arrived, the joinder agreement will be reviewed. Once it has been approved, you will receive another email confirmation.
- ❖ Finally, you will receive an email to set up your password for online access to account statements, disbursement requests and more!

If you have any questions or need help completing the joinder agreement online, please call The Arc trust office at 317.977.2375 or 800.382.9100.