

# **DayOne Reliance, Inc.**

## **Disclosure of Non-Legal Representation**

DayOne Reliance is an Illinois non-for-profit corporate trustee that professionally operates supplemental needs trusts for persons with disabilities. Our experienced and caring staff is available to assist individuals and their families with the following:

- ✓ Explaining the various trust options offered and the potential benefits of each;
- ✓ Taking them through the steps of setting up and/or joining a trust and working with various vendors;
- ✓ Providing feedback to the attorney in drafting the appropriate trust;
- ✓ Opening Trusts in a timely and professional manner;
- ✓ Managing Trust Disbursements in a timely and professional manner in compliance with the trust agreements;
- ✓ Maintaining participant files and records;
- ✓ Assisting with the processing and distribution of participant K1 for tax preparation purposes;
- ✓ Serving as the central point of contact for individual participant and their families once the trust account is opened;
- ✓ Serving as liaison between DayOne Reliance, grantors/donors, their personal attorneys, participants/beneficiaries, and their families;
- ✓ Making the most of the private resources available to improve and enrich the lives of trust beneficiaries with disabilities;
- ✓ Accepting, managing and controlling real property when appropriate.

### **Non-Legal Representation Disclosure Understanding:**

DayOne Reliance and its professional staff are not licensed attorneys and therefore DO NOT give legal advice or legal opinion. Our staff and legal counsel only represent DayOne Reliance and DO NOT represent you. You, your legal representative, and legal counsel are solely responsible for the decisions you make regarding this trust.

I have read, understand, and agree with the information regarding non-legal representation contained above.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Participant / Beneficiary Signature

\_\_\_\_\_  
Parent or Legal Guardian \* Signature

\_\_\_\_\_  
Witness Signature

NOTE: \* If the parent is not the legal guardian of the adult participant/ beneficiary, the participant/ beneficiary MUST sign. The parent may sign as the Witness.