

THIS IS A LEGALLY BINDING DOCUMENT. YOU ARE ADVISED TO SEEK PROFESSIONAL  
ADVICE BEFORE SIGNING.

PLANNED LIFETIME ASSISTANCE NETWORK OF PENNSYLVANIA  
TRUST FOR THE MENTALLY DISABLED

ADOPTION AGREEMENT

The undersigned Settlor hereby adopts the PLANNED LIFETIME ASSISTANCE  
NETWORK OF PENNSYLVANIA TRUST FOR THE MENTALLY DISABLED - MASTER  
TRUST AGREEMENT ("Master Trust"), and assigns to the Trustees of the Master Trust all  
of his right, title and interest in and to the property set forth on Schedule A attached  
hereto (minimum contribution \$5,000), to be held by the Trustees, IN TRUST, as a  
separate Trust Account for the purposes, and on the terms and conditions, set forth in  
this Adoption Agreement and the Master Trust, the provisions of which are hereby  
adopted by the Settlor and incorporated by reference herein.

1. NAME, ADDRESS & TELEPHONE NUMBER OF SETTLOR:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Tel: \_\_\_\_\_

RELATIONSHIP TO BENEFICIARY: \_\_\_\_\_  
[If Section 4(b) applies, Settlor must be the parent,  
grandparent, or legal guardian of the Beneficiary,  
or a Court of competent jurisdiction]

2. NAME AND ADDRESS OF BENEFICIARY

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. AMOUNT OF INITIAL CONTRIBUTION: \$ \_\_\_\_\_  
(List cash and other property on Schedule A)

**INITIALS OF  
SETTLOR**

4. TYPE OF TRUST ACCOUNT:  
(Initial (a) or (b), but not both)
- (a) Family Trust (contributions not made with assets of the Beneficiary) \_\_\_\_\_
  - (b) Self-Settled Trust (contributions made in whole or in part with assets of the Beneficiary) \_\_\_\_\_
5. DISTRIBUTIONS DURING LIFETIME:  
(Initial (a) or (b) but not both)
- (a) Income distributed to or for the Beneficiary in Trustees' discretion; no invasion of principal allowed \_\_\_\_\_
  - (b) Income and principal distributed to or for the Beneficiary in Trustees' discretion \_\_\_\_\_
6. DISTRIBUTION UPON DEATH OF BENEFICIARY:  
(Initial all which apply)
- (a) Trustees authorized to pay expenses of Beneficiary' funeral and burial  
(May not be selected if Section 4(b) applies) \_\_\_\_\_
  - (b) Trustees directed to repay State for Medical Assistance (if any) paid on behalf of Beneficiary  
[Must be checked if Section 4(b) applies] \_\_\_\_\_
  - (c) Trustees directed to distribute remaining principal to persons, and in amounts or proportions, set forth in Section 7 below \_\_\_\_\_

7. DISPOSITION OF TRUST REMAINDER:

Name of Remainder Beneficiary (Person or Organization)	Amount or Percentage Of Trust Account to be Paid
(a)	_____
(b)	_____
(c)	_____

8. REVOCABILITY OF TRUST BY SETTLOR: (Initial one)	INITIALS OF SETTLOR
(a) Trust Account may be revoked	_____
(b) Trust Account may not be revoked [Must be checked if Section 4(b) applies]	_____

9. EARLY TERMINATION OF TRUST: (Initial one)	
(a) Trustees may terminate Trust Account in their discretion under Master Trust Section 6(a) [May not be elected if Section 4 (b) applies]	_____
(b) Master Trust Section 6(a) not elected	_____

10. PROFESSIONAL REPRESENTATION:

Settlor has consulted and been represented with regard to the Master Trust and this Adoption Agreement by the following legal counsel:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_

11. ACKNOWLEDGMENT OF RECEIPT

Settlor acknowledges receipt of a copy of this  
Adoption Agreement and the Master Trust Agreement

\_\_\_\_\_

IN WITNESS WHEREOF, the undersigned Settlor, intending to be legally bound,  
executes this Adoption Agreement this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Witness:

\_\_\_\_\_

\_\_\_\_\_

SETTLOR

This Adoption Agreement and Trust is accepted this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_ at Wayne, Pennsylvania.

\_\_\_\_\_  
TRUSTEE

\_\_\_\_\_  
TRUSTEE

\_\_\_\_\_  
TRUSTEE

\_\_\_\_\_  
TRUSTEE

\_\_\_\_\_  
TRUSTEE

SCHEDULE A

PLANNED LIFETIME ASSISTANCE NETWORK  
OF PENNSYLVANIA  
TRUST FOR THE MENTALLY DISABLED

ADOPTION AGREEMENT

Settlor: \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Date Executed: \_\_\_\_\_

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1. \$ \_\_\_\_\_ cash

2. Securities: \*

a)

b)

c)

(Attach additional sheets if necessary)

\* Contributions of marketable securities will be accepted by the Trustees, but will be immediately sold and the proceeds commingled for investment purposes. The Settlor is advised to consult his or her legal advisors regarding the tax consequences of the contribution and subsequent sale of securities by the Trustees.