

THE FIRST FLORIDA POOLED TRUST

Instructions For Completing This Joinder Agreement

Please read the entire Joinder Agreement carefully, including all of the exhibits. Some of the exhibits require you to provide the Trustee with specific information. If you submit an Agreement that is incomplete or inaccurate, it may not be approved. Please do not leave any empty spaces; if a question does not apply to you, then indicate “N/A” in your response. Attach extra sheets of paper for any question if the provided space is inadequate. If you have any doubts about your ability to complete this Agreement properly, you should contact an attorney or obtain other assistance.

You are encouraged to seek independent legal counsel if you have any questions about the terms of this Agreement.

1. Please be sure to include all of the following exhibits when you submit the Agreement. Please be sure to provide complete information.

Exhibit “A,” *Declaration of Trust.*

Exhibit “B,” *Grantor and Beneficiary Information.*

Exhibit “C,” *Desires of Grantor for Use of Distributions From Trust During Lifetime of the Beneficiary.*

Exhibit “D,” *Proof of Grantor’s Status to Establish Trust on Behalf of the Beneficiary.*

Exhibit “E,” *Disclaimer Regarding Legal Advice.*

Exhibit “F,” *Trustee Fees.*

2. After the Agreement is reviewed and accepted, you will receive a signed copy and a copy of the Declaration of Trust. If you need or want copies of the exhibits, please make them before submitting your Agreement for approval.
3. Please remember to enclose a check with your completed Agreement for whatever amount you are contributing to the Trust sub-account. This should be made payable to: “The First Florida Pooled Trust.” The one-time administrative setup fee will be automatically deducted from your sub-account.

This Agreement is a binding legal document. You are encouraged to seek independent, professional advice before signing.

Return your completed, signed and notarized Agreement, along with your checks, to the Trustee at the following address:

Family Network on Disabilities of Florida, Inc.
2735 Whitney Road
Clearwater, FL 33760