

A Special Needs Trust



**Developmental
Disabilities**
Endowment Trust Fund



***Protect Today
Provide for Tomorrow***

“

I chose the DD Endowment Trust Fund vs. a private attorney special needs trust because of a government backed program that should outlive us, the ease of application, the low cost to get started, and the personable, knowledgeable staff at The Arc Washington State running the program.

Peter T., Parent

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DD ENDOWMENT TRUST FUND OVERVIEW

Welcome

Congratulations on taking the first step toward planning for a secure financial future by learning more about the Washington State Developmental Disabilities Endowment Trust Fund.

Making an informed decision about any kind of financial planning is good for everyone, but when it comes to individuals with intellectual/developmental disabilities who receive government benefits, it's even more important to understand how to invest in the future while ensuring eligibility for vital services and benefits.



The information in this booklet answers the most commonly asked questions about the Trust Program. If there is a particular question you have that's not addressed, feel free to contact us (see back page for contact information).

About the DD Endowment Trust Fund

The DD Endowment Trust Fund is a supplemental special needs trust program. It was established in 1999 by the Washington State Legislature and opened for enrollments in July of 2002.

The DD Endowment Trust Fund allows individuals with developmental disabilities, or their families, to set aside funds for future use without affecting their eligibility for government services and benefits, such as Supplemental Security Income (SSI) and Medicaid.

Funds can be withdrawn from the trust and used for many services not covered by other benefits, including recreation, therapy, clothing and transportation.

The DD Endowment Trust Fund is an easy and effective way to prepare for the future (and life's unexpected expenses) without risking financial eligibility for needed benefits and services.

Benefits of the Trust Program

- Enables families and individuals to open a special needs trust at a minimal cost.
- Protects Beneficiaries' eligibility for public benefits, regardless of their trust value.
- Enhances the quality of life for the individual by paying for activities, purchases, and enriching experiences not covered by government services.
- Provides a safety net to pay for services and supports in the future, in the event they are reduced (due to budget cuts and policy changes).
- Offers incentives in the form of state matching funds on fees.
- Provides conservatively invested and safely managed funds by the Washington State Investment Board.

An additional benefit is that the DD Endowment Trust Fund is administered by The Arc Washington State and overseen by a Governor-appointed board that includes family members of individuals with intellectual/developmental disabilities. Trust holders can be assured that we understand the needs of people with developmental disabilities.

As the result of this stable, public-private partnership, the DD Endowment Trust Fund takes the challenge out of establishing a special needs trust, and puts affordability back into the equation for investing in the future.





Eligibility

Individuals are eligible to open a trust account with this program if they meet three conditions ***at the time of enrollment***:

1. Reside in the State of Washington.
2. Meet the state definition of developmental disability, as determined by a representative of the Washington State Developmental Disabilities Administration.
3. Be under the age of 65 at the time of enrollment.



Trust Fund Partners

-  **The DD Endowment Governing Board** establishes policy for the Trust Program. The 7-member, Governor-appointed board always includes at least four individuals who have family members with a developmental disability.
-  **The Arc Washington State** acts as Trust Manager and is the one point of contact regarding the Trust Program. The Arc provides ongoing customer service, including education about the program, enrollment information, contribution and disbursement assistance, and overall administration of the individual trust accounts.
-  **The Washington State Department of Commerce** provides support to the governing board and manages the trust's contracts and program development.
-  **The Washington State Investment Board** invests the Trust's funds, along with more than \$110.7 billion from other fund sources. The funds are invested conservatively at the direction of the DD Endowment Trust Fund Governing Board. An individual's private contributions and state matching funds are managed and invested separately from the state retirement and public trust funds. For additional details on how the funds are managed, please visit the WSIB's website at: www.sib.wa.gov/financial/fp_ot.asp.

The DD Endowment Trust Fund is unlike any other special needs trust in that the State of Washington has put its financial and organizational support behind its administration and investments.

Types of Trust Accounts

The Trust Program offers two types of individual trust accounts to meet the needs of families and individuals. The source of the funds going into the account determines which trust needs to be opened. An individual may have more than one account with this program.

Trust I (Third Party)

A Trust I is an account that can only receive contributions from a third party (anyone who is not the Beneficiary). Upon the death of the Beneficiary, the remaining private contributions and earnings are distributed according to how the trust documents were filled out when the account was opened. In other words, remaining funds will be dispersed as directed in the trust documents. Unlike Trust II (see below), they are not paid to the state as payment recovery for government services received during the person's life.

Trust II (Self-Settled)

A Trust II is an account in which only the Beneficiary's funds may be contributed. Upon the death of the Beneficiary, the state is entitled to recover dollar for dollar for services provided. It is highly unlikely, if the individual has been receiving services for any length of time, that there will be any funds left after the state recovers from the account. This is a requirement of all special needs trusts funded with the Beneficiary's funds according to Social Security law.

The difference between Trust I and Trust II:

- The source of the funds going into the account.
- What happens to the remaining funds in the trust upon the death of the Beneficiary.

Other than those two differences, all management, policies, contributions and disbursements are managed the same for both types of trusts.

Use of Funds

The Trust allows families and individuals to save funds—either for the near future or decades from now—to pay for many supplemental services, supports, activities, and purchases that improve an individual's quality of life.

Withdrawals from the accounts are referred to as disbursements. Disbursements from the accounts are as varied as the interests of the individuals enrolled in the program, but they all have one purpose: to enrich the life of the Beneficiary.

Some uses of trust funds may include:

- Education, information and training opportunities
- Assistance with personal care, skill building, financial management, medical monitoring, meal preparation, shopping, home maintenance and house cleaning
- Unusual or extraordinary disability-related shelter expenses
- Capital expenses, including environmental modifications and transportation
- Respite care
- Disability-related support groups
- Transportation costs
- Vacation, travel and recreation
- Employment supports and tuition
- Advocacy and legal services
- Social productivity and personal fulfillment activities, such as volunteering, club membership and recreation
- Assistive technology, including computers and electronic equipment
- Clothing
- Medical care, counseling, therapies and other health related services, including alternative practitioners, not covered by public benefits
- Birthday and holiday presents for the Beneficiary to give to others
- Individual trust account expenses, including: enrollment, bookkeeping, tax return preparations and filing, tax payments, annual management expenses and other trust related fees
- Pre-paid burial expenses*
- Items the Trust Manager deems appropriate and reasonable within the guidelines of the Governing Board

*Funds in the trust can only be expended during the Beneficiary's lifetime. Because the trust account ceases to exist upon their death, and funds cannot be disbursed for related expenses after the Beneficiary has passed away, we encourage pre-planning related to burial and funeral expenses.

Expenses Not Allowed Under the Trust for SSI Recipients

Expenses that cannot be paid from the trust include shelter costs (rent, heat, power, water, sewer, garbage, etc.) which are to be paid from the Beneficiary's Social Security benefit.

Incentives and Costs to Participate

The DD Endowment Trust Fund Program and the Trust Fund Partners are able to keep costs to a minimum with sound oversight and management. This allows more of the dollars to go towards the Beneficiary's financial future, instead of costly fees.

Although the fees for the program are minimal, and lower than most managed trusts, we are currently crediting back to the trust account the following amounts as additional incentives:

- 100% of the initial \$600 enrollment fee
- 100% of the annual tax preparation and filing fee
- \$75 of the 1% annual management fee (annual maximum fee \$750)

"As parents of an adult son with disabilities, we are well aware of how uncertain the future may be for our son. His DD Endowment Trust Fund is one thing we can do to reduce that future uncertainty." —MJW, Parent

All fees will be deducted from private contributions and will then be credited back to the individual trust accounts in the form of State Matching Funds. Although a Beneficiary may have more than one account, only the first account opened qualifies to receive the incentives on fees. (For qualifications to receive current incentives see next section.)

Enrollment Fee

There is a one-time enrollment fee of \$600.00. This is a fee to open the account. With the current incentive, the account will open with a \$600.00 balance in State Matching Funds.

Tax Return Preparation and Filing Fees

The Trust is required to prepare and file an annual individual tax

return for each trust account. Currently, the fee is credited back to the trust account 100%. Contact The Arc Washington State for the current fee.

Annual Management Fee

One year after the initial contribution, and yearly thereafter, the account will be charged an annual management fee of \$75 or 1% of the account's balance, whichever is greater. The fee will not exceed \$750 per year. The state currently credits back \$75 of the annual management fee per year.

Qualifications to Receive Current Incentives

1. Minimum Contribution Requirement

The minimum contribution requirement to keep an account in good standing, and qualify for the incentives on the fees, is to invest the equivalent of \$25 a month. Contributions may be made on a schedule that meets your needs, whether that is monthly, periodically, or annually.

2. Three Year Vesting Period

An account becomes vested by accumulating a minimum of \$25 per month of private contributions for three consecutive years. Contributions in excess of \$25 per month may be applied to future months for the purpose of qualifying for current incentives, but may not be applied to past months for vesting purposes.

An account must meet both the minimum contribution requirement and the three year vesting requirement before a Beneficiary may use the State Matching Funds for services and supports.

“My husband and I looked at a couple of other trust products, one through a bank and one through an insurance company. The DD Endowment was considerably less expensive to manage and had the backing of our state government, which made it feel very secure. It has been a great move for us and our daughter. Also, very easy to use.” —S.A., Parent

ENROLLMENT PROCESS

Now that you understand more about the DD Endowment Trust Fund and its many benefits, it's time to enroll. The following pages outline a six step process:

1. Ensure Eligibility
2. Request an Enrollment Packet
3. Review and Complete Joinder Agreement & Schedule C
4. Notarize Primary Donor Signature
5. Prepare Enrollment Fee Check
6. Mail the Packet



If you have questions about enrollment at any time, please contact The Arc Washington State, or visit ddetf.wa.gov.

Step 1 Ensure Eligibility

Individuals are eligible to open a trust account with this program if they meet three conditions ***at the time of enrollment***:

1. Reside in the State of Washington.
2. Meet the state definition of developmental disability, as determined by a representative of the Washington State Developmental Disabilities Administration.
3. Be under the age of 65 at the time of enrollment.

To verify eligibility that an individual meets the state definition of developmental disability, please provide a copy of:

- A letter from the Washington State Developmental Disabilities Administration that references the prospective Beneficiary as a client (example: a letter stating the name of the individual's case manager); **or**
- A copy of the first page of an Individual Service Plan (ISP) or Planned Action Notice (PAN); **or**
- Contact the prospective Beneficiary's current case manager to request a letter indicating that the individual is a client of the WA State Developmental Disabilities Administration.

Only residents of Washington State with a developmental disability that meet eligibility criteria of the Washington State Developmental Disabilities Administration at the time of enrollment are eligible to be a Beneficiary of a DD Endowment Trust Fund account. This proof of eligibility must be submitted with the completed enrollment packet.

Step 2 Request an Enrollment Packet

Contact The Arc Washington State to have an enrollment packet mailed or emailed, or download the document online at ddetf.wa.gov. When requesting or downloading a packet, be sure to identify and download the correct documents for the type of trust you would like to open, as Trust I and Trust II documents are not the same.

The enrollment packet contains:

- Joinder Agreement;
- Schedule C; and,
- Master Trust Document

The Joinder Agreement and Schedule C are fill-in-the-blank documents, which will need to be completed prior to submission. These documents personalize the trust for the Beneficiary.

The Master Trust Document, which governs the trust accounts, is important to keep for the Beneficiary's records.

The three documents combined (Joinder Agreement, Schedule C, and Master Trust Document) create a complete trust document.

Step 3 Review and Complete the Joinder and Schedule C

Review the Joinder Agreement and legibly fill in all requested information. Be sure to refer to page 1 and 2 of the Joinder Agreement for terminology definitions.

Enrollment consultants are available to review the document, page by page if needed, when questions arise. Please call, or email etf@arcwa.org if you have questions or need assistance completing the documents.

Step 4 Notarize the Primary Donor's Signature

Once the Joinder Agreement is completed, the Primary Donor, listed on page 3, will need to have his or her signature notarized. Some banks provide this service for a nominal fee.

When the Trust Office receives a completed enrollment packet, the Trust Manager will sign and have their signature notarized. A copy of the Joinder Agreement will be included in the new account packet sent to the Primary Representative, who is listed on page 4 of the Joinder Agreement.

Step 5 Prepare the Enrollment Fee Check

Make the \$600 enrollment fee check or money order *payable to DD Endowment Trust Fund*.

A separate initial contribution check may also be included with the packet. This check would also be made payable to DD Endowment Trust Fund.

Step 6 Mail the Packet

Send the completed enrollment packet to the Trust Office at the address below. The completed packet includes:

- 📄 Proof of eligibility
- 📄 Joinder Agreement – completed and notarized
- 📄 Schedule C
- 📄 Enrollment check

Developmental Disabilities Endowment Trust Fund
c/o The Arc Washington State
2638 State Ave NE
Olympia, WA 98506



WHAT TO EXPECT AFTER ENROLLING

New Account Packet

After you have opened a DD Endowment Trust Fund trust account, a new account packet will be mailed to the Primary Representative within a week of the trust opening. This will include:

- 📄 a copy of your Joinder Agreement and Schedule C;
- 📄 information about the new account; and,
- 📄 contribution slips and disbursement forms.

Contributions

Included in the new account packet are contribution slips. Blank forms are also available at ddetf.wa.gov. Please include a filled out contribution slip along with a check made payable to Endowment Trust Fund.

Mail to:

Developmental Disabilities Endowment Trust Fund
c/o The Arc Washington State
2638 State Ave NE
Olympia, WA 98506

Checks, money orders and cashier's checks are the only type of assets the program is able to accept.

At this time, the program does not have the ability to accept direct deposits; however, online bill pay service may be available through your financial institution. Please reference the individual's account number in the memo.

Disbursements

Included in the new account packet are the *Disbursement Procedures and Disbursement Request* forms.

Blank request forms are also available at ddetf.wa.gov. A completed Disbursement Request form signed by the Primary Representative is required in order for a request to be processed.

All requests must be submitted along with copies of any billings, invoices or other appropriate documentation supporting the expenditures.

Important Information About Disbursements:

Checks are never made payable directly to a Beneficiary, as it may be counted as income and impact the benefits they are entitled to receive. Each account is eligible for twelve free disbursements during a plan year (the account's year starts when the first contribution to the account is made). Multiple checks written at one time count as one disbursement. After twelve disbursements, each additional disbursement will be charged a \$12.50 fee.

Quarterly Statements

The Primary Representative also receives quarterly statements. Statements are generally mailed out about a month after the quarter has ended. Each quarterly statement will reflect contributions and disbursements, earnings or loses, and any fees charged or matched back by the program.

UPDATING INFORMATION IN THE TRUST

Most parts of the trust document can be updated; however, ***three parts of the trust cannot be changed*** once a trust is opened. These are:

1. Primary Donor
2. Beneficiary
3. Disposition Plan

To make a change, the Trust Program requires written confirmation from the Primary Representative to update the Beneficiary's file.

Forms to update some account information are available on the Trust website at ddetf.wa.gov (click on *forms*). You may also call to request to have them mailed to you.

Your completed forms, with updated changes, can be emailed or mailed to the Trust Office.

FREQUENTLY ASKED QUESTIONS



Establishing a Trust

I already have a trust for my child who has a developmental disability and want to keep it. May I also set up a DD Endowment Trust Fund?

Yes. You may want to set up a DD Endowment Trust Fund in addition to other trusts in order to gain access to the Trust Fund Partners' expertise.

May I move funds from an existing private trust into the DD Endowment Trust Fund?

Potentially, you may be able to transfer funds from an existing trust into the DD Endowment Trust Fund. You will need to consult an attorney to review your specific situation.

I already have a trust for a family member who has a developmental disability, and another family member is serving as trustee. How is the DD Endowment Trust Fund better?

The DD Endowment Trust Fund is managed by reliable Trust Fund Partners that provide stability and fund oversight throughout the lifetime of the Beneficiary. This trust does not depend on an individual to manage and adjust investments or stay current on federal and state regulations.

The DD Endowment Trust Fund takes care of the day-to-day management so you don't have to. Family members may still be actively involved in helping beneficiaries use funds for supplemental services.

What would it cost to set up a special needs trust on my own?

For an exact answer, you will need to ask an attorney how much he/she will charge. An estimated cost for a private special needs trust, based on comparable trusts and associated expenses, may run between \$1,000 and \$5,000 to set up, and require ongoing management fees to operate.

Changes in a Beneficiary's Eligibility

What happens if a Beneficiary of a **Trust I** becomes ineligible by moving out of Washington; or by no longer meeting the state definition of developmental disability in RCW 71A.10.020(5)?

If the Beneficiary becomes ineligible, the Primary Representative may elect one of the following options, subject to final approval by the Governing Board:

1. The balance of the Beneficiary's individual trust account will be placed in another existing special needs trust established for the Beneficiary. Any costs related to the transfer will be charged to the Beneficiary's individual trust account.
2. The individual trust account will remain open, and the account will be assessed fees at a level that will support all account maintenance costs. The Beneficiary will no longer be eligible for state matching funds as of the ineligible date.
3. A) If ineligible by moving. The Beneficiary's individual trust account will be terminated and distributed as if the Beneficiary died.
B) If ineligible by DD definition. The Trust Manager will direct distributions to or for the benefit of the Beneficiary.

The Primary Representative is required to notify the Trust Manager if the Beneficiary moves out of Washington or no longer meets the state definition of developmental disability.

What happens if a Beneficiary of a **Trust II** becomes ineligible to participate in the program by moving out of Washington State?

If the Beneficiary becomes ineligible due to moving out of state, the Primary Representative may elect one of the following options,

subject to final approval by the Governing Board:

1. The balance of the Beneficiary's individual trust account will be placed in another existing special needs trust established for the Beneficiary. Any costs related to the transfer will be charged to the Beneficiary's individual trust account.
2. The individual trust account will remain open, and the account will be assessed fees at a level that will support all account maintenance costs. The Beneficiary will no longer be eligible for state matching funds as of the ineligible date.
3. If ineligible by moving, the Beneficiary's individual trust account will be terminated and distributed as if the Beneficiary died.

What happens if a Beneficiary of a [Trust II](#) becomes ineligible because they no longer meet the state definition of developmental disability?

If the Beneficiary becomes ineligible due to no longer meeting the state definition of development disability, and there are assets remaining in the individual trust account, the state is entitled to recover dollar for dollar up to the total medical assistance paid on behalf of the Beneficiary under the State's Medicaid Plan.

If there are remaining assets after the state recovery of funds, the Primary Representative may elect one of the following options, subject to final approval of the Governing Board:

1. The balance of the Beneficiary's individual trust account will be placed in another existing special needs trust established for the Beneficiary. Any costs related to the transfer will be charged to the Beneficiary's individual trust account.
2. The individual trust account will remain open, and the account will be assessed fees at a level that will support all account maintenance costs. The Beneficiary will no longer be eligible for state matching funds as of the ineligible date.
3. The Trust Manager shall make or direct distributions to or for the benefit of the Beneficiary as requested by the Primary Representative.

TAX QUESTIONS



Tax Questions for Trust I (Third Party Trusts)

The following is an abbreviated summary of certain federal tax matters. Individual tax results may vary. Consult a tax advisor for specific implications of your participation in the trust.

This summary is not intended to provide individual tax advice and is subject to the terms of the Master Trust Document and Joinder Agreement. If the individual trust account will at any time contain the Beneficiary's own funds, refer to [Tax Questions for Trust II \(Self-Settled Trusts\)](#).

Is the Beneficiary's individual trust account subject to federal income tax?

Each individual trust account is subject to federal income tax on its investment earnings (such as interest and dividends). If all of those earnings are used on behalf of the Beneficiary during the calendar year, federal income tax does not apply to the trust; however, the Beneficiary may be subject to tax.

Who prepares the tax forms and pays federal income tax owed?

The DD Endowment Trust Fund will prepare and file an **IRS Form 1041** for each individual trust account. The fund will issue a check from the individual trust account for any tax owed. A copy of the IRS Form 1041 will be mailed to the Primary Representative.

Once income tax has been paid on earnings, tax does not have to be paid again when funds are spent on behalf of the Beneficiary.

What are the tax implications for the Primary Donor or person establishing an individual trust account?

Income Tax

The donor is not required to pay federal income tax on earnings generated by the individual trust account.

Gift Tax

Contributions to an individual trust account will be considered a gift for federal tax purposes. The law requires that individuals file a gift tax return (***IRS Form 709***) for each year that they put money into the individual trust account. Even though the law requires that a gift tax return be filed, there may be no gift taxes owed. For more information, refer to the IRS rules regarding gift taxes.

Tax Deductions: A contribution to an individual trust account is not deductible as a charitable contribution because the funds directly benefit a specific individual.

What are the tax implications for the Beneficiary of an individual trust account?

Income Tax

When the individual trust account's earnings are disbursed on behalf of the Beneficiary (and not retained in the account), the Beneficiary must claim the amount of those disbursements as taxable income.

If the Beneficiary owes income tax, he or she will be required to prepare and file an income tax return, as well as pay any income tax due. The DD Endowment Trust Fund will provide the Primary Representative with a completed ***IRS Schedule K-1 (Form 1041)*** showing the investment earnings to be included in the Beneficiary's income tax calculation.

If income tax is paid on the investment earnings while in the individual trust account, tax does not have to be paid when funds are spent on behalf of the Beneficiary.

Gift Tax

The Beneficiary will not owe gift tax on contributions placed in an individual trust account.

Will the Beneficiary owe income taxes on state matching contributions?

A Beneficiary should not have to pay income tax on the matching contributions made by the state.

Tax Questions for Trust II (Self-Settled Trusts)

The following is an abbreviated summary of certain federal tax matters. Individual tax results may vary. Consult a tax advisor for specific implications of your participation in the trust.

This summary is not intended to provide individual tax advice and is subject to the terms of the Master Trust Document and Joinder Agreement. If the individual trust account does not contain any of the Beneficiary's own funds, refer to **Tax Questions for Trust I (Third Party Trusts)**.

What are the tax implications for a person who establishes an individual trust account?

Income Tax

Because the Beneficiary is the sole contributor of a self-settled trust, he or she will be required to pay federal income tax on earnings generated by the individual trust account.

Who prepares the tax forms and pays federal income tax owed?

If required, the Beneficiary will be responsible for preparing and filing a federal income tax return. The DD Endowment Trust Fund will prepare an **IRS Form 1041** for the individual trust account and send it to the Primary Representative.

This form will document all of the investment earnings that the Beneficiary may be required to report on his or her federal income tax return.

Upon request, the Trust Manager will make a disbursement from the individual trust account to pay for taxes attributable to the account. Once income tax has been paid on the earnings, tax does not have to be paid when funds are used on behalf of the Beneficiary.

Is the Beneficiary's individual trust account subject to federal income tax?

No, the Beneficiary's individual trust account is not subject to federal income tax on its investment earnings because the Beneficiary will be required to pay any federal income tax attributable to this account.

What is the Beneficiary's responsibility for paying tax related to the individual trust account?

Income Tax

If the Beneficiary owes income tax, he or she will be required to prepare and file an income tax return, as well as pay any income tax due. The DD Endowment Trust Fund will provide the Primary Representative with a completed ***IRS Schedule K-1 (Form 1941)*** showing the investment earnings to be included in the Beneficiary's income tax calculation.

Upon request, the Trust Manager will make a disbursement from the individual trust account to pay for taxes attributable to the account.



TERM DEFINITIONS



Beneficiary

An eligible person for whom an individual trust account has been established. *

Disbursement

A withdrawal of funds from an individual trust account.

Disbursement Plan

A plan submitted at the time of enrollment that identifies the goods or services most likely appropriate to supplement the needs of the Beneficiary. (Schedule C of the Joinder Agreement)

Disposition Plan

A plan submitted at the time of enrollment that directs how any remaining private funds will be disbursed from the individual trust account upon the death of the Beneficiary. *

Individual Trust Account

The account that holds assets for the Beneficiary.

Joinder Agreement

Establishes the Primary Donor's consent to invest funds according to the master trust document. It includes the disbursement and disposition plans for the individual trust account, and designates the Primary Representative and additional people authorized to request disbursements.

Master Trust Document

Establishes and defines the operation and guidelines of the DD Endowment Trust Fund and governs individual trust accounts. Separate master trust documents apply to the Trust I (Third Party Trust) and the Trust II (Self-Settled Trust).

Matching Funds

Refers to money that the state contributes to individual trust accounts, based on program requirements.

Primary Donor

The person who sets up an account for a Beneficiary, and submits and signs the Joinder Agreement.*

Primary Representative

The person authorized to request disbursements, receives account statements and is named in the Joinder Agreement as the person the Governing Board and/or Trust Manager may communicate with regarding a Beneficiary's interests.

Vested Account

An individual trust account that has initially qualified for matching funds by meeting requirements over a 3-year period.

* These three items are permanent and can never be changed on the Joinder Agreement.

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I have found the DD Endowment Trust staff to be both knowledgeable and extremely easy to work with. And while they have never met my son face to face, it has always felt like they were interested in him and his needs.

John S., Parent

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CONTACT INFORMATION

DD Endowment Trust Fund
c/o The Arc Washington State
2638 State Ave NE
Olympia, WA 98506

Website: ddetf.wa.gov
Toll free: 1.888.754.8798 ext. 1
Fax: 360.705.9084

Trust Assistant
Email: etfinfo@arcwa.org

Disbursement Coordinator
Email: disbursements@arcwa.org

Enrollment Coordinator
Email: dylan@arcwa.org

Trust Manager
Email: melissa@arcwa.org

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