



COMPARISON OF ACTIVE AND INACTIVE TRUSTS

	ACTIVE	INACTIVE
Required Documents	Appropriate First or Third Party Trust Agreement Documents and accompanying documents must be completed	
Enrollment fee	\$750 - First Party Trusts Sub-Account Beneficiaries may qualify for a reduced enrollment fee based on the initial deposit and the Beneficiary's yearly income	\$100
Minimum deposit	\$500 plus Enrollment Fee	\$100 plus Enrollment Fee
Activation	Sub-Account is active at opening	The trust will convert to an active trust sub-account when a deposit is received that is greater than \$500. The remainder of the Enrollment Fee (applicable Enrollment Fee minus \$100) is deducted when the sub-account is fully funded.
Minimum required balance	\$500	\$100
ID Number and Statements	Trust ID Number is assigned at opening Quarterly trust sub-account statements	Trust ID Number is assigned at inactive opening No quarterly trust sub-account
Fees	Fees are assessed on a monthly basis	No fees are charged
Investments	Sub-Account is invested per directive in the trust agreement documents and consistent with MSNT policy	Not invested
Amendments to Trust Language	MSNT reserves the right to amend the trust agreement documents to comply with applicable federal and state statutes and regulations	
Notification Requirements	MSNT should be notified of status changes including but not limited to: <ul style="list-style-type: none"> • Address or contact information changes for Beneficiary, Donor(s) or Co-Trustee(s) • Death of named Donor(s), Co-Trustee(s), Beneficiary or Remainder Beneficiary • Appointment of guardian, conservator, or other legal status changes for the Beneficiary 	

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