Third-Party Special Needs Trust

Enrollment Donation Fee

Thank You for Choosing Proxy Parent Foundation

As part of the enrollment process for the PLAN of California Master Pooled Third-Party Special Needs Trust, an Enrollment Donation Fee is required before the enrollment process can begin.

This donation helps support Proxy Parent Foundation's mission of providing professional trust administration and compassionate services to individuals with disabilities and their families throughout California.

Tax-Deductible Contribution

Proxy Parent Foundation is a 501(c)(3) nonprofit organization. As such, the Enrollment Donation Fee may be tax-deductible to the extent permitted by law, is non-returnable/refundable if taken as an itemized deduction. We recommend consulting with your tax advisor regarding your specific tax situation.

Payment Options

Option 1: Check by Mail

Please make checks payable to:

Proxy Parent Foundation

(Include "Enrollment Donation" for beneficiary name in the memo line)

Mail to:

Proxy Parent Foundation
15243 La Cruz Drive #889
Pacific Palisades, CA 90272

Option 2: Credit Card

https://donations.proxyparentfoundation.org/

Option 3: Zelle

Note: The Zelle account is listed as our parent company "Planned Lifetime Asst Network."

Please include the beneficiary's name in the payment notes to ensure proper credit.



remittance@proxyparentfoundation.org

Questions?

If you have any questions regarding the Enrollment Donation Fee, payment methods, or the enrollment process, please contact:

Director of Client Relations
Carol Larkin
Director of Client Relations
Phone: 562-383-3863
Email: clarkin@proxyparentfoundation.org

We are happy to assist you and guide you through the enrollment process.

Important Reminder

The Enrollment Donation Fee must be received before Proxy Parent Foundation can begin processing enrollment documents and establishing the trust relationship.

Prompt payment helps ensure that your enrollment moves forward as quickly and efficiently as possible.