

SPECIAL NEEDS TRUST PROGRAM

Establishment Road Map



Research and Planning

1



SCHEDULE A CONSULTATION

3



ESTABLISH YOUR SUB-ACCOUNT



4

SCHEDULE AN ESTABLISHMENT APPOINTMENT



2

Attend Trust Talk Tuesday



*APPOINTMENTS ARE TYPICALLY HELD VIRTUALLY; IF YOU PREFER AN IN-PERSON MEETING, LET US KNOW VIA EMAIL AT FRONT.DESK@THEARCOFNOVA.ORG.

