

## Rep Payee Intake Forms Checklist

### CLIENT INTAKE SHEET

Please make sure the following are included on the form, otherwise we CANNOT process the request.

- Mother's Maiden Name.
- Place of Birth.

### CLIENT CONTRACT

- This form MUST be signed by the client.

### BUDGET WORKSHEET

Please fill out this form as completely as possible and make sure the following are included

- Landlords name and address.
- Copy of the lease.
- Account numbers for utility bills, phone bills, etc.

### ADVANCED NOTIFICATION OF REPRESENTATIVE PAYMENT

- This form MUST be signed by the client. This is required when we submit the request to Social Security Administration.

### CONSENT TO RELEASE INFORMATION- 2 FORMS ARE REQUIRED

- OUR form, signed by the client.
- YOUR agency's form, signed by the client.

### PHYSICIAN'S STATEMENT OF PATIENT'S CAPABILITY TO MANAGE BENEFITS

- This is required if the client has ***never had a representative payee.***
- The form **MUST** be signed by the Physician and submitted to SSA when the Application is filed.

### PNC DEBIT CARD ENROLLMENT

- If the client elects to receive their personal spending funds on a debit card, the Authorization Form must be signed by the client.

**IF POSSIBLE, PLEASE INCLUDE A COPY OF THE CLIENTS SOCIAL SECURITY CARD,  
DRIVERS LICENSE OR STATE ID**

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