# Beneficiary Support Toolkit for Trust Professionals



# Chapter 2: Decision-Making

**Gathering Informed Consent**

While trust professionals are required to provide documentation to government and other oversight agencies, we recommend you use these steps to gather consent for any information you share with others about the beneficiary, even if you are not legally required to get consent from the beneficiary. You can gather consent from someone – even if they cannot read, write, or are not verbal.

Below, we share the steps you can take to gather informed consent from beneficiaries.

**Steps to Gather Consent**

Include a friend or supporter in the conversation with the beneficiary. This person can help explain how the beneficiary communicates or understands information – and help them ask questions about the consent forms.

Present what you want someone to consent to. Some good practices include:

* Providing the information in a clear, easy-to-understand format. This may include providing an explanation in plain language, audio or video format, or even in pictures or stories.
* Explaining broadly what it is you want to do and what you are asking for the beneficiary’s permission to do.
* Explaining any risks there would be to the action you want to take and risks of not taking the action.
* Walking them through any form you are asking them to sign and explaining each part.

Give time for the beneficiary to ask questions about what you want them to consent to do.

Follow up on any concerns the beneficiary may have.

Ask the beneficiary whether they agree, and if so, ask them to sign the form.

A signature can include the beneficiary’s written name, signed name, “x,” or any other mark on the signature line.

If the beneficiary cannot write or sign their name, it is a good idea to include at least one unbiased witness, who is not a supporter or friend of the beneficiary, and two witnesses when possible, in the conversation with the beneficiary. Then, the witness(es) can sign and date the consent form as well to attest that the consent information was accurately explained, the beneficiary apparently understood the information, and consent was given freely.

Share a copy of the signed form with the beneficiary.



**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

Date Revised: September 7, 2021.