

WHAT CAN I USE THE TRUST FOR TO ENCHANCE THE BENEFICIARY'S LIFE

The Trustee is focused on improving the quality of a Beneficiary's life while preserving the Beneficiary's eligibility for needs-based benefits. Please understand the Trustee may be restricted in how trust funds can be used.

This list highlights **examples ONLY** of types of disbursements. While the list may not be comprehensive to your situation this list does not limit the Trustee in approving or making other distributions for items or amenities that the trustee may believe are in the best interest of the Beneficiary.

Distributions cannot be made directly to the Beneficiary in any form, including cash, checks, money orders, or wire transfers. Distributions are made directly to the vendor, store, or provider so that the distribution does not count as income to the Beneficiary, which would have a negative effect on government assistance eligibility. Funds disbursed from the trust account must be **for the SOLE BENEFIT of the Beneficiary only.**

DISTRIBUTION REQUESTS MIGHT INCLUDE:

1. Acupuncture, acupressure & massage*
2. Transportation costs for bus pass, Uber, Lyft or other public transportation
3. Clothing items
4. Clubs and club fees (service clubs, zoo, advocacy groups, and museums)
5. Computer equipment including internet service, printers, and other related computer expenses
6. Decorations for bedroom or playroom including curtains, bed lines, towels or other home goods
7. Dental work, including anesthesia*
8. Diapers, wipes, other personal hygiene products (please speak to the Trustee regarding these purchases)
9. Dry cleaning and laundry services
10. Elective surgery*
11. Fitness equipment and gym memberships
12. Furniture
13. Haircuts, nail salon services and beauty supplies
14. Holiday decorations and cards (**NOT GIFTS**)
15. Room fan or air conditioner (please speak to the Trustee regarding these purchases)
16. Musical instruments, lessons and music
17. **NON-FOOD** grocery items -- such as personal hygiene products, paper & cleaning products (please speak to trustee regarding these purchases)
18. Over-the-counter medications*
19. Personal care services (non-family member)
20. Pets, pet's supplies & veterinary service
21. Prepaid funeral expenses (per state regulation)
22. Sporting events
23. Sporting equipment and uniform
24. Telephone service and equipment, including cell phone (age dependent)
25. Speech, PT and OT therapy*
26. Scooters, strollers, walkers and wheelchairs
27. Tickets for concerts or sporting events (for beneficiary and an accompanying companion)
28. Transportation to get back and forth to therapy, doctor, sporting events
29. Vacation (please speak to the Trustee regarding these disbursements)

*if not covered by Medicaid or other benefit program

DISTRIBUTIONS NOT ALLOWED: Rent, mortgage, utilities (electric, gas, sewer, water), food (including candy), drink (including alcohol), tobacco or tobacco items, weapons, firearms, luxury items, property taxes, home insurance, cash donations, and lottery tickets. The Trustee cannot distribute for services that have been previously paid for and/or disbursements that are not in the best interest of the Beneficiary.