

Allowable and Non-Allowable Disbursements

Listed below is a general list of items that you (the Grantor) may and may not purchase with funds from your Special Needs Trust Account. Neither list includes all items, this is simply guidance to assist you in making purchases. Always call and ask your Trust Administrator if a disbursement is allowable.

Allowable Disbursements

- Clothing & Footwear
- Personal Needs
- Recreation and Entertainment (social activities, fitness membership, concerts, plays, sporting event tickets)
- Educational Items (tuition, books, DVD/Video, camp, testing, magazines)
- Travel/Vacation (for the Grantor and one companion if medically necessary)
- Home Furnishings (Including: furniture, washer, dryer, refrigerator, TV, phone, answering machine, and computer etc. There are restrictions for minors and homes with more than one person.)
- Transportation, Vehicle Insurance, Repairs, and Gasoline
- Medical and Dental expenses not covered by Medicaid (Including: eyeglasses, elective and cosmetic dental treatments, elective testing or surgery)
- Cable, Home, and Cell Phone bills (limited to one of each)
- **Pre-paid** Funeral expense
- Burial Plot

Allowable and Non-Allowable Disbursements

Non-Allowable Disbursements For Minors

- Rent
- Utilities (electric, gas, sewer, water)
- Food (Including candy)
- Drink (Including alcohol)
- Weapons
- Firearms and Ammunition
- Luxury Items
- Property Taxes¹
- Homeowner's Insurance
- Cash
- Donations
- Lottery Tickets
- Loans
- Employment Related Items
- Gifts to others
- Repairs to family home not owned by the trust
- Furniture for the family home
- Travel costs for other family members
- Gas and/or mileage for standard pediatric appointments and school
- Gift cards

¹ In certain emergency situations, payment of property taxes or other annual shelter costs may be requested.