

GUIDELINES FOR DISBURSEMENTS

Empowering individuals with disabilities to live their fullest life. John 10:10



All trust disbursements are subject to the discretion of the Trust Advisor (FLC) and must be made for the sole benefit of the Beneficiary. FLC takes into consideration many aspects affecting the Beneficiary, including: trust sub-account balance, age, special circumstances, and government benefits received. SSI and Medicaid recipients are not permitted to request distributions for food, shelter and medical services paid for by government benefits. To do so may result in reduction or loss of benefits. All payments must be made to a third party and are verified by supporting documentation.

Below are some examples of goods and services that can and cannot be paid for with Trust assets. This list is not all-inclusive. Please contact FLC if you have any questions about a specific disbursements.

Allowable Disbursements (Not covered by another source)	Disallowed Disbursements
Durable medical equipment, dental/dentures, vitamins/supplements, over-the counter medications, glasses/contacts/visual screens, and hearing aids	Services or items for which the Beneficiary is entitled to receive payment through another source
Personal attendant care, supplemental nursing care, home care, therapy/treatment	Payments that primarily benefit someone other than the Beneficiary
Clothing, personal care items, and hair care	Groceries, food items or eating out
Internet, cable, and phone services	Electric, natural gas, heating fuel, water, sewer, garbage removal
Books, magazines, musical instruments, recreational equipment, crafts, and tickets for events/games	Cash or payments made directly to the Beneficiary
Vacation and travel for Beneficiary and approved companion	Travel costs for other family members
Pet supplies	Gift cards or gift certificates
Home maintenance and accommodations, appliances and furniture	Mortgage, rent or other payments for shelter
Car purchase, insurance and maintenance, gas, transportation services (FLC will take a lien on purchased vehicle)	Real property taxes
Education or training, computer, printer or software	Charitable donations or gifts to others
Legal, accounting, and cleaning services	Alcohol
Pre-paid funeral arrangements (Must be purchased during Beneficiary's lifetime)	Gambling or lottery tickets

"My purpose is to give life in all its fullness" – John 10:10

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