

SETTLEMENT SOLUTIONS NATIONAL POOLED TRUST

How can my Pooled Trust Funds be used? What can I purchase with my funds?

State Medicaid rules and federal law are used to determine what is categorized as allowable, discretionary, non-support or supplemental, special needs. Monies from the Trust are never used for support, maintenance or primary medical. The Settlement Solutions National Pooled Trust is designed to allow money to be put aside for the supplemental needs of a person with a disability.

Primary Rules

The request must be for the sole benefit of the trust beneficiary

The trustee can't give the trust beneficiary cash

The following examples are not all inclusive, but illustrate the types of special, supplemental, non-support disbursements that are appropriate for the Trustee to make on behalf of the trust beneficiary.

Personal Services:

Cable TV, cell phone, internet, maid, insurance, transportation, entertainment, pet grooming, travel expenses, rehabilitation, tuition, music lessons, massage, seminars, movies, sporting events

Personal Care:

Hair care, eye and dental care, attendant care

Professional Services:

auto repair/maintenance, attorney/accountant/financial planning fees, home modifications/home improvements related to disability

Goods:

Vehicles, clothing, furniture, television/stereo, mattress/box springs, eyeglasses/contacts, vacations, hobby supplies, toys, essential dietary needs, computers/software, pets/pet supplies, prepaid funeral expenses (Amount varies by state), washer/dryer, musical instrument, household products, tools/supplies, kitchen appliances, outdoor grill, games, school tuition, gasoline, household appliances

Remember: The Trust can purchase any good and service that adds to the trust beneficiary's quality of life, and are not paid for by public benefits.

Caution: this list is just a guide; each state has differences in what they allow from your trust.

NON-EXCLUSIVE LIST OF PERMISSIBLE TRUST DISTRIBUTIONS

1. Automobile/Van
2. Accounting services
3. Acupuncture/Acupressure
4. Appliances (TV, VCR, stereo, microwave, stove, refrigerator)
5. Bottled water or water service
6. Bus pass/public transportation costs
7. Camera, film, recorder and tapes, development of film
8. Clubs and club dues (record clubs, book clubs, health clubs, service clubs, zoo, advocacy groups, museums)
9. Computer hardware, software, programs, and Internet service
10. Conferences
11. Courses or classes (academic or recreational) including supplies
12. Curtain, blinds, drapes, and the like
13. Dental work not covered by Medicaid, including anesthesia
14. Down payment on home or security deposit on apartment
15. Dry cleaning and/or laundry services
16. Elective surgery
17. Fitness equipment
18. Funeral expenses
19. Furniture, home furnishings
20. Gasoline and/or maintenance for automobile
21. Haircuts/salon services
22. Holiday decorations, parties, dinner dances, holiday cards
23. Home alarm and/or monitoring/response system
24. Home improvements, repairs, and maintenance (not covered by Medicaid) including tools to perform home improvements, repairs, and maintenance by homeowner
25. House cleaning/maid services
26. Insurance (automobile and/or possessions)
27. Laundry service or washer/dryer
28. Legal fees/advocacy
29. Linens and towels
30. Massage
31. Musical instruments (including lessons and music)
32. Non-food grocery items (laundry soap, bleach, fabric softener, deodorant, dish soap, hand and body soap, personal hygiene products, paper towels, napkins, Kleenex, toilet paper, any household cleaning products)
33. Over-the-counter medications (including vitamins and herbs, etc.)
34. Personal assistance services not covered by Medicaid
35. Pet and pet supplies, veterinary services
36. Physicians specialists if not covered by Medicaid
37. Private counseling if not covered by Medicaid
38. Repair services (appliance, automobile, bicycle, household, fitness equipment)
39. Snow removal/landscaping/lawn service

40. Sporting goods/equipment/uniforms/team pictures
41. Stationary, stamps, cards, etc.
42. Storage units
43. Taxicab
44. Telephone service and equipment, including cell phone, pager, etc.
45. Therapy (physical, occupational, speech) not covered by Medicaid
46. Tickets to concerts or sporting events for beneficiary (and an accompanying companion)
47. Transportation (automobile, motorcycle, bicycle, moped gas, bus passes)
48. Some Utility bills (such as direct TV, cable TV, phone)
49. Vacation (including paying for personal assistance to accompany the beneficiary)
50. Clothing

EXAMPLES OF TRUST DISTRIBUTIONS THAT WILL REDUCE/ELIMINATE SSI BENEFITS

1. Paying for basic shelter-related expenses
2. Paying for food
3. Cash distributions to the beneficiary
4. Paying for a service already paid for by another source
5. Distribution not for the beneficiary (i.e., made primarily for the benefit of another person)

I understand there will be limitations on how funds may be utilized, including the fact that no payments may be made directly to a Beneficiary and all distributions must directly benefit the Beneficiary (no gifting). Each request for a distribution must be accompanied by a distribution request form and a bill or a receipt for the expenditure that benefits the Beneficiary. No distributions may be made after the death of a Beneficiary, including funeral or cremation expenses and I have been advised to prearrange for these services. If the Beneficiary is receiving Supplemental Security Income (SSI) there will be additional restrictions regarding distributions. If I direct that an individual be paid for services rendered to the Beneficiary, and the individual providing these services is not in the routine business of providing such services, then there will be specific accounting, tax, employment and reporting requirements associated with such employment pursuant to state and federal law. **By signing below, I acknowledge my understanding of all of the foregoing information.**

Pooled Trust Beneficiary/Grantor Signature

Date

Printed Name