



Policies and Procedures

A Special Needs Trust is established to enhance the quality of life for the beneficiary. Disbursements from the trust can cover the expenses of goods and services that are supplemental to a beneficiary's basic needs. Basic needs such as food and shelter should be covered by a beneficiary's Social Security Disability Payment, Supplemental Security Income payment or other government benefits.

Understanding expenditures that may be permitted from a beneficiary's trust can be complicated. To help with this process, Arcare, Inc. has prepared two lists. One list is of generally permitted expenditures. The second list is of expenditures which are generally not permitted. All expenditures are subject to the discretion of the Trustee.

Request for trust expenditures may only be requested as payment to third-party vendors. All expenditures must be verified by the original invoice or receipts, with no exceptions.

When requesting a disbursement from a beneficiary's trust share, the following conditions must be met:

- **A Request for Disbursement form must be completed for every request from the trust.**

Forms that are incomplete or unclear will not be processed and will be returned to the beneficiary.

Request for vehicles and houses have specific procedures and forms for processing. Please use the appropriate forms for these purchases.

- **Funds must be disbursed for goods and services to a third-party.**

Under no circumstances can funds be disbursed directly to the beneficiary.

- **The funds disbursed must be for the sole benefit of the beneficiary.**

Request for disbursements will be approved or disapproved **within 5 business days** of receipt of the completed request form. Request for vehicles and houses have specific procedures and will require more time for processing. **Forms that are incomplete or unclear will not be processed** and will be returned to the beneficiary. If approved, payment will be processed within 3 days following approval of the disbursement. Please allow 7-10 business days for payment by check. Following these procedures will ensure that all disbursement requests are handled in a timely manner, thereby enhancing the quality of life for the beneficiary.

If in the future, your address changes or your phone number changes, you must notify us in writing by completing the Change of Address form provided by Arcare.