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## HELPFUL HINTS

### FOR SENDING REQUEST FORMS AND OTHER DOCUMENTS

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Enclosed in this packet are the forms to submit to Secured Futures to Request to Disburse Funds from your Trust. Please review the following helpful hints for sending requests and expediting the process.

**E-MAIL:** email@SecuredAlliance.org

**If you are e-mailing, please use any of the following formats for the attachments:**

- PDF
- JPEG/JPG
- TIFF
- PNG

**FAX:** 215-358-2291

#### GENERAL GUIDELINES

- 1) Send all requests and documents/images in **one** e-mail or fax.
- 2) A separate request should be sent for each different payee or vendor.
- 3) Make sure all paperwork is legible, clear and readable.
  - Use only blue or black ink – not pencil
- 4) **Always** e-mail documents as an attachment.
  - Sending links to Dropbox, Google, etc. **does not work**; also sending documents inside the e-mail (embedded) **does not work either**.
  - **Note to Mac Users:** Make sure your e-mail setting default is set to send 'Microsoft Friendly Documents'.
- 5) If ordering items from an online store, please send a copy of the shopping cart in one of the above listed formats along with the request form. **Links do not work** for the shopping cart **or** your personal account with the vendor.
- 6) Please send all requests only once. Call if you require confirmation of receipt.
- 7) When sending receipts, send the originals; be sure to keep a copy for your records. Please maintain receipts in a neat and orderly fashion (unfold and flatten as much as possible) so they are readable when they are sent.
- 8) Fill out all forms completely, attach required documents and remember to sign.

**Do you have a Smart Phone?** Two Apps are available: 1) Genius App or 2) Tiny Scanner. Both take pictures of your documents, save as a PDF and can also send it in an e-mail.

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#### SECURED FUTURES

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