

CARE SERVICES REQUEST

DATE: Click or tap to enter a date. ACCOUNT NUMBER: _____

BENEFICIARY/CLIENT NAME: _____

PHONE NUMBER: _____ EMAIL ADDRESS: _____

SIGNATURE OF BENEFICIARY|POA|GUARDIAN: _____

CHECK PAYABLE TO: _____

SOCIAL SECURITY OR EIN NUMBER OF CAREGIVER: _____

COMPANY NAME (IF APPLICABLE): _____

ADDRESS: _____

PHONE: _____ HOURLY RATE* : _____ MAX. HOURS PERMITTED PER WEEK*: _____

**Hourly Rate and Maximum Hours permitted must be agreed upon by Secured Futures before work begins.*

I am requesting that Secured Futures, Inc., as Trustee, disburse funds from the beneficiary trust share for the benefit of the above-named Beneficiary. The disbursed funds will be used to cover the cost of services I have arranged for the Beneficiary as indicated below. Secured Futures, Inc. has not been involved in selecting, scheduling, training, supervising, providing instruction to or otherwise controlling the work of the caregiver. I understand that Secured Futures, Inc. is not employing the caregiver and is not responsible for a withholding or paying federal, state, or local income tax, or payroll tax of any kind on behalf of the caregiver. I also understand that Secured Futures, Inc. does not provide any insurance coverage (including workman's compensation) for the caregiver.

DIRECT DEPOSIT INFORMATION*:

BANK NAME: _____

ACCOUNT #: _____ ROUTING #: _____

**To ensure accurate processing and verification of your account details, please provide either a voided check or an official letter from your bank that includes your name, account number, and routing number. This documentation is required to complete your submission and confirm that all information provided is correct.*

DATE (1/1/2024)	HOURS (9AM-12PM)	DESCRIPTION OF SERVICES PROVIDED EX: HOUSE CLEANING, ERRANDS, APPOINTMENTS	HOURLY WAGE	DAILY WAGE # HRS WORKED x WAGE
TOTAL AMOUNT:				

PLEASE ALLOW 5-8 BUSINESS DAYS FOR PROCESSING. INCOMPLETE FORMS WILL BE RETURNED.

FORMS ARE AVAILABLE ON OUR WEBSITE IN THE RESOURCE LIBRARY.

SECURED FUTURES.ORG