Secured Futures
A SECURED ALLIANCE AFFILIATE

TO SUBMIT THIS FORM
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DISBURSEMENTS FREQUENTLY REQUESTED

Secured Futures frequently receives disbursement requests for the following items. This list offers ideas of items that may enhance the quality of life for the beneficiary, however, the Trustee has discretion in approving requests for disbursements. ***Please note that this is simply a guide and the items requested must be for the sole benefit of the beneficiary.***

- **Prepaid** burial expenses of beneficiary
- Advocacy services
- Cable television
- Clothing for the Beneficiary
- Computer hardware and software
- Education, tuition and/or books
- Entertainment and recreation tickets
- Equipment (electronic, entertainment, adaptive)
- Expenses related to owning and operating one car
- Furniture and household items
- Gardening and lawn care
- Guardianship and advocacy services
- Home appliances
- Home renovations to improve accessibility
- Independent evaluations
- Insurance premiums (health, dental, car, renter, and in some cases, life)
- Internet access
- Job coaching
- Legal fees
- Magazine subscriptions
- Medical equipment
- Medical, nursing, vision and dental care not covered by another source
- Medications
- Massage therapy
- Office supplies and postage
- Companion/Respite care not covered by another source
- Pet care and supplies
- Private counseling and case management
- Private lessons and materials
- Supplemental dietary needs (doctor note or prescription may be required)
- Telephone service
- Testing (vocational, medical, psychological, etc.)
- Travel expenses for beneficiary

DISBURSEMENTS FREQUENTLY NOT PERMITTED

Supplemental Security Income (SSI) and other government benefits are received by the beneficiary to cover basic needs such as food and shelter. If the disbursements are made from a special needs trust for basic needs, a beneficiary may lose all or part of his/her government benefits. The following is a list of disbursements typically not permitted:

- Cash given directly to the beneficiary for any purpose
- Rent or mortgage payments
- Property taxes
- Heating fuel (gas, oil)
- Electricity
- Water
- Sewer
- Garbage collection service

In certain emergency situations, payment of property taxes or other annual shelter costs may be requested. Secured Futures reviews each request considering individual situations and impact on preservation of benefits.

PLEASE ALLOW 5-8 BUESINESS DAYS FOR PROCESSING. INCOMPLETE FORMS WILL BE RETURNED. FORMS ARE AVAILABLE ON OUR WEBSITE IN THE RESOURCE LIBRARY. SECUREDFUTURES.ORG