Secured Futures
A SECURED ALLIANCE AFFILIATE

TO SUBMIT THIS FORM
FAX: 215-358-2291
EMAIL: email@SecuredFutures.org
MAIL: 10439 S 51st Street STE 225, Phoenix, AZ 85044
PHONE: 602-635-6674

DISBURSEMENTS FREQUENTLY REQUESTED

from a Minor Beneficiary's Special Needs Trust

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. Reminder, there is a parental duty and obligation of support for minor beneficiaries.***

- **Prepaid** burial expenses of beneficiary
- Camp tuition
- Clothing for the Beneficiary
- Furniture for Child's Bedroom
- Computer hardware and software
- Education, tuition, and/or books
- Entertainment and recreation tickets
- Equipment (electronic, entertainment, adaptive)
- Guardianship and advocacy services
- Home renovations to improve accessibility
- Medical or Education Evaluations
- Legal fees (as it relates directly to beneficiary)
- Magazine subscriptions
- Medical equipment and supplies, not covered by another source
- Medical, nursing, vision and dental care not covered by another source
- Medications
- Massage therapy
- Therapy animal care and supplies
- Private lessons and materials
- Supplemental dietary needs (doctor note or prescription may be required)
- Testing (vocational, medical, psychological, etc.)
- Travel expenses for beneficiary

DISBURSEMENTS TYPICALLY NOT PERMITTED

from a Minor Beneficiary's Special Needs Trust

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. Additionally, there are items that cannot be purchased from the account of a minor beneficiary. Those items would be considered as falling under the "parental duty of support." A parental duty of support can be thought of as those items that one would not typically expect their child to pay if there were no trust involved. The following is a list of disbursements typically not permitted:

- Cash given directly to the beneficiary for any purpose
- Rent or mortgage payments
- Repairs to a family home not owned by the trust
- Furniture for common areas of a family home
- Property taxes
- Heating fuel (gas, oil)
- Electricity
- Water
- Sewer
- Garbage collection service
- Travel costs for other family members
- Mileage and/or gas to and from standard pediatric appointments and school

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