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

TRUE LINK APPLICATION

BENEFICIARY NAME ***(please print)***: _____

CARDHOLDER NAME ***(if different from beneficiary)***: _____

ACCOUNT NUMBER: #_____

** SUBMISSION OF APPLICATION DOES NOT GUARANTEE APPROVAL. **
You will be contacted directly if your request for a True Link card is denied.

The True Link card covers small monthly expenses for the sole benefit of the trust beneficiary.
Please refer to our "Frequently Requested Disbursements" list for items that are allowable expenses.
If you are uncertain if an item is allowable, please call and speak with a Trust Administrator.

PLEASE REVIEW AND INITIAL EACH SECTION BELOW:

_____ INITIAL: TERMS OF AGREEMENT

To qualify for the True Link card, you must agree and comply with the following terms:

- Itemized receipts MUST be saved after purchases are completed. If you purchase items online you may need to submit a screenshot of the shopping cart as the receipts may not be itemized. Make a copy of the receipt(s) for your records before mailing any originals to Secured Futures, copies of receipts may be emailed to email@securedfutures.org
- Please keep copies of the receipts for your records. Social security or Medicaid may review your account and request receipts.
- Cash cannot be obtained with a True Link debit card.
- Gift cards and items for anyone other than the trust beneficiary is not permitted.

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_____ INITIAL: CARD LOST OR STOLEN

In the event your card is lost or stolen you must notify Secured Futures immediately.

_____ INITIAL: FEES

There is an annual fee of $108.00 (charged at $9/month). This fee is put in place by True Link and charged on the first of the month to the True Link card. Secured Futures does not charge any additional fees for this card.

_____ INITIAL: TERMINATION

This agreement shall be terminated if one of the following occurs:

- Failure to comply with the terms of agreement.
- Purchase of unauthorized items such as: gift cards, rent, utilities (i.e. gas, water, electric, oil).
- Failure to submit receipts.

The process of termination is as follows:

1. You will receive an Infraction Letter in the mail from Secured Futures notifying you, including a reminder of the rules & guidelines agreed upon.
2. Specific vendors will be blocked or funds for a specific purchase may not be reloaded to the card.
3. Card will be deactivated.

_____ INITIAL: ACKNOWLEDGMENT

- I have read and been informed about the content, requirements, and expectations of the True Link card.
- I have received the Frequently Requested Disbursements and Disbursements Typically Not Permitted lists.
- I have received the How to Submit Your True Link Receipts document.
- I have received the True Link Tips and Tricks document.
- I agree to abide by the terms of the agreement.
- I understand if I am uncertain an item is permitted, I will contact the Trust Administration department for further guidance before making the purchase.
- I understand that if at any point I fail to comply with the terms of this agreement, my True Link card will be terminated.

CARDHOLDER INFORMATION BELOW IS REQUIRED

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**If the beneficiary is a minor child, please complete as Parent / POA / Guardian as Card Holder.*

Cardholders aged 18-20 may be required to submit a **GOVERNMENT ISSUED photo ID.*

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You will be contacted directly if your request for a True Link card is denied.

CONTACT INFROMATION:

NAME OF CARDHOLDER: _____ **DOB:** _____/_____/_____

NAME OF BENEFICIARY: _____ **DOB:** _____/_____/_____

ADDRESS ***(cannot be po box)*:** _____

CITY: _____ **STATE:** _____ **ZIP:** _____

PHONE: (_____) _____ - _____

EMAIL ADDRESS: _____

SIGNATURE ***(BENEFICIARY | POA | GUARDIAN)*:** _____ **DATE:** _____

PRINT NAME (OF SIGNATURE ABOVE): _____ **DATE:** _____

When you have completed the form, please submit using the contact information provided below and our team will begin processing. Please allow 5-8 business days for processing.

All incomplete forms will be returned.

TO SUBMIT FORM ***(use any of the following below)*:**

- **Email**: email@securedfutures.org
- **Fax**: 215-358-2291
- **Mail**: 10439 S. 51st Street, Suite 225, Phoenix, AZ 85044

Questions?

Please contact us directly at 602-635-6674 and we will be happy to assist you.

**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**

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HOW TO SUBMIT TRUE LINK RECEIPTS

At Secured Futures, we're committed to processing your True Link requests swiftly and efficiently. To help us serve you better, please follow these guidelines when submitting your True Link receipts:

1. **Submit Itemized Receipts**
2. **Online Purchases:** If you made a purchase online, please send a screenshot of both the shopping cart and the receipt. This ensures we have a complete record of the items you bought.

For Email Receipts:

1. **Subject Line:** Include the **beneficiary's name** and "True Link Receipts" in the subject line.
2. **Clear Photos:** Take clear photos of each receipt. If you can't read it, we can't either.
3. **Attachments:** Attach the receipts as a PDF or photo.
4. **Email:** Send your email to email@securedfutures.org.

For Fax Receipts:

1. **Label Receipts:** Write the **beneficiary's name** on the top of each receipt.
2. **Keep Copies:** Make a copy for your records.
3. **Fax Number:** Fax your receipts to 215-358-2291.

For USPS Mail:

1. **Label Receipts:** Write the **beneficiary's name** on the back of every receipt.
2. **Keep Copies:** Make a copy for your records.
3. **No Tape or Staples:** Please do not tape or staple receipts.
4. **Mailing Address:**
   - Secured Futures
   - 10439 S. 51st Street, Suite 225
   - Phoenix, AZ 85044-8626

If you have any questions, please contact us at 602-635-6674 or email@securedfutures.org.

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TRUE LINK TIPS & TRICKS

True Link offers various methods of support to cardholders, including an automated phone system, an online web portal, and text message alerts. All of these are accessible 24 hours a day, 7 days a week.

1. PHONE SUPPORT

Call 1-800-299-7646 and follow the prompts:

- **Press 1:** Check your current balance.
- **Press 3:** Find out if/when a transfer is scheduled for your card.
- **Press 6:** Get help if you are at a store/merchant and experiencing difficulties making a purchase.
- **Press 7:** Hear the reason for recent declines.
- **Press 8:** Hear your 10 most recent completed transactions.
- **Press 9:** Speak to a True Link Customer Service representative (available between 7 AM and 5 PM Pacific Time, Monday through Friday).

2. ONLINE ACCESS

Visit True Link Online Portal:

- Click the "Login" button in the top right corner.
- Then click the link that says "Cardholder log in."
- Provide the last 4 digits of your Social Security number, your date of birth, and the last 4 digits of your True Link Card number.
- You will then be able to see your balance, monthly statements, and recent transactions.

3. TEXT MESSAGE ALERTS

Note: Cardholders must call our Customer Support line to request text message alert setup. True Link representatives can be reached at 1-800-299-7646 between 7 AM and 5 PM Pacific Time, Monday - Friday.

- As long as True Link has your mobile number on file, it is very easy to check your balance from your phone (standard text message rates may apply).
- Text the word "balance" to 1-800-299-7646.
- If you receive an error message, please call the True Link Customer Support team at 1-800-299-7646 to make sure your number is on file.

Need Assistance?

If you have any questions, please contact us at 602-635-6674 or email@securedfutures.org.

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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.

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