

ALABAMA FAMILY TRUST

A sample of COVERED ITEMS:

- Pre-need funeral/burial contracts
(Limit of \$5,000 on the Services portion in these contracts)
- Medical, dental care, vision not paid for by benefits
- Sitter Services for the Life Beneficiary allowed by Medicare or SSI in the Beneficiary's particular case (SITTER MUST HAVE EMPLOYER IDENTIFICATION NUMBER – EIN)
- Education, including tuition, books and supplies
- Electronic equipment such as computers, television, video games
- Hobby supplies
- Telephone, cell phone service
- Cable service
- Clothing
- Personal hygiene products such as: shampoo, lotion, adult diapers
- Differential for private room in nursing home
- Magazines/Newspaper subscription
- Furniture
- Household goods: bedding, curtains
- Mileage for Co-Trustee visits Beneficiary: (1) to perform tasks specifically associated with the Beneficiary's care; or (2) trips made with the Beneficiary in the vehicle, for example, for treatments; or (3) trips to purchase/pick-up medication or supplies for the Beneficiary. Mileage is not reimbursable for general visitation (Mileage is compensated at the then Federal IRS rate in force at the time)

Sample of NOT COVERED ITEMS:

- Food, drinks
- Shelter, such as mortgage payment, rent payment, residence insurance
- Utilities: Electricity, Water and Gas/Propane
- Final expenses upon the death of the beneficiary. (THE TRUST IS TO BE USED FOR LIFETIME BENEFITS ONLY)
- Mileage for general visitation of Life Beneficiary is NOT reimbursable

*Please note that the items not covered are a result of the restrictions imposed by law to special needs trust and/or the rules and regulations of Medicaid and SSI.

** If the Co-Trustee is at all unsure whether a service or expense is covered for reimbursement under the special needs trust, please do not hesitate to contact the AFT office.