

ALABAMA FAMILY TRUST:

A sample of covered items:

- Medical supplies not covered by Medicaid
- Over the counter drugs
- Personal hygiene products such as shampoo, lotion, adult diapers
- Clothing/shoes for the Beneficiaries
- Monthly cable service
- Telephone, including cellular, service
- Mileage for Co-Trustee visits to 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 for general visitation of Beneficiaries is **NOT** reimbursable. (Mileage is compensated at the then Federal IRS rate in force at the time.)
- Vacation expenses for the Beneficiary and a caretaker (These expenses need to be discussed with AFT prior to the trip. Not all expenses can be paid by the Trust. Appropriate documentation is required to support these expenditures.)
- Items for bedrooms, comforters, bedspreads, curtains
- Furniture for the beneficiary, such as new bed

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

- Electronic Games
- Movie or DVD Rentals
- Veterinary bills for Beneficiary's pet
- Pre-need funeral/burial contracts (Limit of \$5,000 on the Services portion in these contracts)
- Sitter Services for the Beneficiary if allowed by Medicare or SSI in the Beneficiary's particular case. **Sitter Services must have Employer Identification Numbers from the IRS.**
- Dental bills, not covered by Medicaid or Medicare
- Vision bills, not covered by Medicaid or Medicare
- Repairs to medical equipment not covered by Medicaid
- Differential for private room in nursing facility
- Magazines/Newspaper subscriptions

Items that are not covered:

- Food or food items of any kind
- Shelter, such as mortgage payment, rent payment, residence insurance
- Utilities, such as 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 Beneficiaries is **NOT** reimbursable.

***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.*