



## ALABAMA FAMILY TRUST

Administering Special Needs Trusts

### Beneficiary True Link Agreement

Beneficiary Name: \_\_\_\_\_

#### TERMS OF CARD USE

The card can only be used to purchase items or services deemed permissible by Alabama Family Trust. The card cannot be used to pay for items that are not in the best interest of and for the sole benefit of the Beneficiary; this may result in certain restrictions being placed on the card that prevent the purchase of items or services on the permissible list. The True Link Card is designed as a convenience tool and its use is to supplement the regular usage of the Trust, not replace it.

- The Card cannot be used to access cash in any way.
  - The Card cannot withdraw cash at ATMs, in banks, or after a purchase.
  - The Card cannot be resold or transferred for cash.
  - The Card cannot be used to draw funds independently from the Trust account.
- The card cannot be used to pay for a service already paid for by another source.
- If the beneficiary receives Supplemental Security Income (SSI), the card cannot be used to purchase items considered “in-kind support and maintenance” by that program (e.g., food, rent, mortgage payments, property taxes, electricity, gas, water, etc.).
- If the beneficiary receives SSI and the card is used to purchase any of the above-mentioned items, the Trust must be reimbursed the amount of the impermissible items. If reimbursement cannot be arranged, the beneficiary or his or her representative will be responsible for reporting the impermissible expenditures as in-kind support and maintenance to SSA. **Future use of the card can be suspended for repeated violations.**
- Alabama Family Trust is not responsible for reporting these expenditures; monthly SSI benefits may be negatively affected.

#### **Receipts Are Required**

- The Beneficiary or his or her Representative is responsible for saving all receipts from purchases made with the True Link Card, even if the purchases are permissible.
- All receipts (or photocopies) must be submitted to Alabama Family Trust within one week of purchase.
  - *Recommendation:* take a picture of the receipt with your phone and email it to AFT immediately after purchase

- Failure to send receipts may lead to card suspension or a delay in your next disbursement.
- Note: the option exists to reimburse the Trust if lost receipts cannot be located.

### ***Handwritten Receipts Policy***

- AFT will consider handwritten receipts when an electronic or computer printed receipt is not provided or is unavailable from the original merchant or service provider.
- For these receipts to be considered, they must be legible and contain the following information:
  - Name of Beneficiary
  - Amount of goods or services provided
  - Date goods or services were provided
  - Name of merchant or person providing the goods or services
  - Itemized list of goods or services provided
  - Contact information for merchant or service provider – address, phone number, and email address, if applicable
  - Signature of merchant or service provider (including both signed and printed name)

### **Funding Of Card**

- A maximum limit of \$1,000 per month can be requested for True Link funding. Exceptions can be made on a case-by-case basis at the discretion of the Board.
- All requests must be made using the True Link Request for Disbursement Form.
- **Important Note:** Funds are not immediately available upon submission of a disbursement form. All requests follow the standard disbursement procedure and are submitted for Board approval prior to the funds being loaded onto the card.

### **Examples of Permissible Items or Services**

- Appliances (TV, DVD, stereo, microwave, toaster)
- Clothing, beauty shop, and barber shop
- Computers, tablets, gaming consoles
- Medical, dental, or vision services not covered by Medicaid
- Over the counter medications
- Educational services, school fees and supplies
- Furniture, home accessories
- Insurance, gasoline, and auto maintenance for AFT-owned vehicles
- Certain professional services: storage facilities, printing services, lawncare, cleaning services
- Local transportation
- Newspaper and magazine subscriptions

- Non–food grocery items: personal hygiene products, paper towels, toilet paper, cleaning products
- Pet supplies and veterinary services
- Phone, TV, and cable services
- Tickets to concerts, movies, or sporting events

**The undersigned agrees to all rules set forth in this Beneficiary True Link Agreement. AFT reserves the right to suspend or revoke Card privileges if these rules are not followed or if the True Link Card is misused in any way.**

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**Printed Name**

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**Signature**

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**Date**

Please return this signed Beneficiary True Link Agreement to:

Alabama Family Trust  
2057 Valleydale Road, Suite 111  
Birmingham, AL 35244