



SOCIAL SECURITY

Atlanta Region
61 Forsyth St. SW
Suite 22T64
Atlanta, GA 30303
April 11, 2018

Ms. Melanie Bradford Holliman
Executive Director
Alabama Family Trust
2820 Columbiana Road, Ste 103
Vestavia, AL 35216

Ms. Bradford Holliman,

The Alabama State Legislature reviewed and voted on changes to the Alabama Family trust to be in full compliance with all the components of a Pooled trust under SSA regulations. The Legislature approved, signed, and dated 1/31/2018 SB17. The Atlanta Office of General Counsel (OGC) agrees the newly amended statute allows Alabama Family Trust (AFT) to meet the requirements of a valid pooled trust. The Atlanta OGC finds the updated Alabama Family Pooled Trust Joinder agreement in full compliance. The revised Statute, SB17 complies with the requirements for a pooled trust under section 1917(d) (4) (C) of the Social Security Act and the relevant provisions of the Program Operations Manual System (POMS).

The Regional Trust lead created and posted an AFT precedent in the SSI Trust Monitoring System for use by Field Office employees reviewing trusts.

Thank you for your time and diligence in this matter.

Sincerely,

Jean

Patricia Jean MacInnis
Center for Disability and Program Support
Regional Trust Lead
SSI Program Team
Atlanta Regional Office