



**BENEFICIARY TRUE LINK AGREEMENT
Terms Of Card Use**

Life Beneficiary Name: _____

- The card can only be used to purchase items or services deemed permissible by Alabama Family Trust (please review the list of permissible items and services below)
- The card cannot be used to pay for items that are not in the best interest of the beneficiary as deemed by the Trust; this may result in certain restrictions being placed on the card that prevent the purchase of items or services on the permissible list
- The card cannot be used to access cash in any way
 - o The card cannot withdraw cash at ATMs, in banks, or after a purchase
 - o The card cannot be resold or transferred for cash
 - o 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
- The card cannot be used to purchase items considered in-kind support and maintenance by the Supplemental Security Income (SSI) program (i.e., food or shelter)
- In the event that the card is used to purchase food or shelter *without* a signed agreement, the beneficiary will be responsible for reporting these expenditures as in-kind support and maintenance to SSA; the Trust or Trustee is not responsible for reporting these expenditures; monthly SSI benefits may be negatively affected
- All purchases on the card must be made for the sole benefit of the beneficiary

Receipts Are Required

- The beneficiary is responsible for saving *all* receipts from purchases made with the True Link Card, even if purchases are permissible
- All receipts must be returned to Alabama Family Trust within one week of purchases
- Failure to send receipts may lead to a delay in your next disbursement or a card suspension

Funding Of Card

- All requests must be done using the Disbursement Request Form
- All requests will be submitted for Board approval prior to the funds being loaded on to card

Permissible Items Or Services

- Appliances (TV, DVD, Stereo, Microwave, Refrigerator, Washer, Dryer, Maintenance)
- Clothing, beauty shop and barber shop
- Computer, tablets, internet service, school fees and supplies
- Medical and dental work not covered by Medicaid, over the counter medications
- Pre-paid funeral and burial expenses
- Furniture, home furnishings, house cleaning, lawn service
- Independent care managers, sitters (through an agency or TEAM)
- Insurance (auto, home, burial), gasoline and auto maintenance
- Legal fees, advocacy, professional services
- Non-food grocery items (personal hygiene products, paper towels, toilet paper, cleaning products)
- Pet supplies and veterinary services
- Tickets to concerts, movies, sporting events

The undersigned agree to the rules set out in this Beneficiary True Link Agreement. If these rules are not followed or if the True Link Card is misused in any way, card privileges will be revoked. If the receipts are not submitted within one week of purchases, card privileges will be suspended or revoked.

_____ Printed Name

_____ Signature _____ Date