

HOW CAN TRUST FUNDS BE USED?

SAMPLE OF ITEMS THAT MAY BE PAID USING TRUST FUNDS:

- Pre-need funeral/burial contracts
Limit is \$5,000 for Medicaid cases and \$1,500 for SSI cases for non-space items unless the contract is irrevocable. Space items include casket, vault, plot, monument, and open/close grave. ***These items must be purchased before death. AFT is not allowed to pay bills once the Beneficiary dies pursuant to Medicaid pay-back requirements.*** Make sure you purchase these items as soon as possible if there is a need for burial items.
- Medical, dental care, vision not paid for by benefits
- Sitter Services for the Beneficiary allowed by Medicaid and SSI in the Beneficiary's particular case (SITTER MUST Comply with AFT Requirements)
- 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 Representative visits to the 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 Federal IRS rate in force at the time.

SAMPLE OF ITEMS THAT CANNOT BE PAID WITH TRUST FUNDS: IN SSI CASES

- Shelter, such as mortgage payment, rent payment, residence insurance
- Utilities: Electricity, Water and Gas/Propane

SAMPLE OF ITEMS THAT CANNOT BE PAID WITH TRUST FUNDS: IN ALL CASES

- Final expenses upon the death of the Beneficiary. (THE TRUST IS TO BE USED FOR LIFETIME BENEFITS ONLY)
- Mileage for general visitation of Beneficiary is NOT reimbursable
- Mileage is not reimbursable if the trust owns the car. Mileage is reimbursable if a third-party is using his or her car to conduct business for the Beneficiary.

NOTE: Restrictions imposed by general trust law and by laws and regulations governing SSI and Medicaid. If the Representative is at all unsure whether a service or expense is covered for reimbursement under the special needs trust, please contact the AFT office 205-313-3915.