PROCEDURE FOR REQUESTING A TRUST DISTRIBUTION

1. Review the list of distributions that may be permitted. Becoming familiar with what is and is not allowed enables requests to be processed efficiently. If uncertain about whether or not a particular item can be approved, please call MSNT for consultation.

2. The **Request for Funds** form must be completed and signed by a person who has the authority to request funds from the account. The signor must be the co-trustee, if one is designated.

3. Attach receipts, statements or estimates for all items requested. Estimates can be secured from most stores. For example, if the beneficiary needs clothing, review a catalog or shop online to determine the cost for the items to be purchased. Print off the information or go to the store and request an estimate. Receipts for items purchased may be submitted, but the reimbursement is subject to the same standards as a request for a distribution. There is no guarantee that reimbursement will be approved.

4. Funds from the trust account are paid only to the co-trustee or the vendor (store or provider), or in some situations to a service provider. Checks will not be made payable to the beneficiary if he/she receives government benefits such as SSI and Medicaid.

5. After the request for a distribution has been approved, the check will be issued in approximately three to five days. If a request is denied, the person who signed the request form will be notified.

6. Some requests for distributions require special forms and documents. Please contact our office if you want funds for the following:

- Purchase of an Automobile.
- Funds for a vacation or other trip.