

Midwest Special Needs Trust
1500 Vandiver, Suite 100, Columbia, MO 65202
Phone: 1-888-671-1069

Instructions for Requesting Funds from a Beneficiary Trust Account

Note:

- **Funds cannot be used for food or shelter.**
- **All funds must be used for the direct benefit of the beneficiary.**

How to Request Funds:

1. Complete the Request for Funds form.

- Indicate the purpose of the request.
 - Funds may be requested to supplement the Beneficiary's monthly income if it can be shown that the Beneficiary's income does not meet necessary living expenses. For example, Trust funds might be used to pay for transportation costs to and from work or therapy.
 - Funds may be requested to meet Beneficiary needs other than living expenses. For example, funds could be used to pay for special equipment required by the Beneficiary, or for medical care or therapy. However, these requests will be approved only if payment from other benefits (such as Medicaid) is not available.

2. Attach receipts for all items requested for reimbursement.

3. Attach invoices from Vendors for services and/or goods that have been billed.

4. To request funds for items not yet purchased, enclose an estimate from the person or company where the item will be purchased.

5. Mail the Request for Funds form to:

Midwest Special Needs Trust
1500 Vandiver, Suite 100
Columbia, MO 65202
Or fax to: 573-882-3445