
DISBURSEMENTS TYPICALLY NOT PERMITTED FROM A MINOR BENEFICIARY'S SPECIAL NEEDS TRUST

Supplemental Security Income (SSI) and other government benefits are received by the beneficiary to cover basic needs such as food and shelter. If the disbursements are made from a special needs trust for basic needs, a beneficiary may lose all or part of his/her government benefits. Additionally, there are items that cannot be purchased from the account of a minor beneficiary. Those items would be considered as falling under the "parental duty of support." Parental duty of support can be thought of as those items that one would not typically expect their child to pay if there were no trust involved. The following is a list of disbursements typically **not** permitted:

- Cash given directly to the beneficiary for any purpose
- Food or groceries
- Rent or mortgage payments
- Property taxes *
- Heating fuel (gas, oil)
- Electricity
- Water
- Sewer
- Garbage collection service
- Repairs to a family home not owned by the trust
- Furniture for common areas of a family home
- Travel costs for other family members
- Mileage and/or gas to and from standard pediatric appointments and school

*** Note:** In certain emergency situations, payment of property taxes or other annual shelter costs may be requested. Secured Futures reviews each request considering individual situations and impact on preservation of benefits.