

ALLOWABLE AND RESTRICTED PURCHASES



The following items are not comprehensive, but provide a general list of common items purchased that the trust can pay for.

Cash cannot be paid to the trust beneficiary because cash will count as income under the eligibility rules for most public benefit programs. This can be avoided by simply paying vendors and service providers directly from their invoice.

Please note, funds must be for the sole benefit of the beneficiary. Funds must be distributed to a third party, they cannot be given to the trust beneficiary or a relative of a beneficiary. A disbursement request form must be completed for every request.

Allowable Purchases

Goods

- Vehicles
- Computers, software
- Clothing
- Furniture
- Appliances (*refrigerator, washer/dryer, tv, microwave*)
- Mattress, bedding
- Eyeglasses/contacts
- Supplemental Dietary Needs (*doctor note or prescription required*)
- Personal care and hygiene items

- Toys
- Household products (*non-food*)
- Tools
- Musical instruments and lessons
- Postage
- Office Supplies
- Educational Material, Books, Magazine Subscription
- Exercise equipment

Services

- Vacation and travel related expenses
- Trips/day trips, etc.
- Cable/internet
- Hair care
- Pet supplies and services
- Attorney and financial assistance fees
- Housekeeping services
- Transportation (car, bicycle, bus pass)
- Auto repair/maintenance

- Auto insurance
- Eye and dental care
- Home or auto adaptations & modifications (*handicap accesible*)
- Tuition
- Tickets (movies, concerts, sporting events) etc.
- Rehabilitation/therapy services
- Telephone bill
- Gym membership

Not Permitted

Distributions will not be made if it is determined that the payment would adversely affect the beneficiary's eligibility for services or supports.

- Direct Cash
- Food/groceries
- Alcohol, tobacco, weapons
- Rent/mortgage
- Lottery tickets
- Property taxes
- Utilities (electricity, garbage water, gas, sewer)
- Homeowner or condo dues