

Special Needs Trust Foundation

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WHAT CAN A SPECIAL NEEDS TRUST DO?

The special needs trust can be used to provide for the needs of a person with a disability and to supplement benefits received from various governmental assistance programs. The following is a list of example expenditures (disbursements) that can be made through the special needs trust. This list is not meant to be all-inclusive. It is a guideline to suggest ways money may and may not be spent to enhance the quality of life, welfare of a person, and an individual's happiness. **However, the Trustee, by law, has absolute discretion in approving requests for disbursement. Please keep in mind this list is a guide and should not be viewed as an entitlement and items requested must be for the sole benefit of the beneficiary.**

Examples of Acceptable (Permissible) Expenditures:

- Adaptive equipment not covered by Medi-Cal (wheelchair, lift, hospital bed, etc.)
- Automobile expenses relating to owning and operating one car (purchase, insurance, gas, maintenance)
- **Pre-Paid/Pre-Need** Burial expenses of beneficiary
- Cable television
- Camp tuition
- Clothing for beneficiary
- Computer hardware and software
- Dental expenses not covered by Medi-Cal
- Education, tuition, books, transportation to school
- Entertainment and recreation expenses (books, magazines, movie/theatre/concert tickets, sporting events, TV, stereo, other audio/visual equipment)
- Eye exams and glasses not covered by Medi-Cal
- Furniture, household items, home décor
- Gardening and lawn care
- Conservatorship and advocacy services
- Home purchase
- Home cleaning and maintenance
- Home appliances
- Home renovations to improve accessibility
- Home repairs (plumbing, roof, electrical, etc.)
- Homeowner insurance premiums
- Independent evaluations
- Insurance premiums (health, dental, car, home, renter)
- Independent living services not covered by benefit programs
- In-Home additional support needs not covered by benefit programs (such as companion services/home health aide)
- Internet access
- Legal fees
- Medical equipment
- Medical expenses not covered by Medi-Cal
- Medications
- Massage therapy
- Personal assistant
- Personal hygiene (haircuts, manicures)
- Pet care and supplies
- Physical therapy not covered by Medi-Cal
- Private counseling and case management
- Private lessons and materials
- Social services not covered by any benefit program
- Stamps and writing supplies
- Supplemental dietary needs
- Telephone service
- Testing (vocational, medical, psychological, etc.)
- Travel/vacation expenses (including airfare, hotel, and transportation)
- Travel expenses for a companion (if needed because of beneficiary's disability-note from Dr. required)

Examples of Trust Distributions that will reduce SSI benefits:

- Shelter expenses (rent, mortgage payments, real property taxes, heating and cooling bills, electricity, water, sewage, garbage collection)
- Groceries or meals
- Cash, gift cards, or any purpose (beyond the \$20 SSI monthly allowance)
- Donations to religious or non-profit organizations
- Reimbursement to 3rd parties (1st Party only)
- Travel expenses for family members visiting trust beneficiary (1st Party only)