

Explanation on Requesting Distributions

PLEASE TAKE A FEW MINUTES TO READ AND UNDERSTAND THE INSTRUCTIONS BELOW. UNDERSTANDING THE DISTRIBUTION PROCESS WILL HELP AVOID PROCESSING DELAYS AND MAKE YOUR TRUST AS EASY TO USE AS POSSIBLE. WHILE THIS EXPLANATION IS NOT EXHAUSTIVE, IT DOES EXPLAIN MOST TYPES OF DISTRIBUTION REQUESTS.

I. General Instructions

All distribution requests must be completed according to these General Instructions.

A. DISTRIBUTION REQUEST FORMS

Please send a Distribution Request Form that is completely filled out as follows:

1. The Beneficiary's name (this is pre-printed for you on the appropriate line);
2. The Grantor's name (this is pre-printed for you on the appropriate line);
3. The exact dollar amount of your request;
4. A brief description of how the distribution will be used;
5. The name and address of the party who will receive the distribution;
6. The date that you are submitting the request; and,
7. The signature of the beneficiary or person authorized to sign.

B. SUPPORTING DOCUMENTATION

Please send appropriate documentation to support your request when you submit your Distribution Request Form.

1. The kind of request you make will determine the kind of documentation that is appropriate to support your request.
2. Please see Section II below for examples of distribution requests and the appropriate supporting documentation.

II. Examples of Supporting Documentation

The two sections below provide some examples of how to document distribution requests with appropriate documentation.

A. DIRECT PAYMENTS TO VENDORS OR SERVICE PROVIDERS

1. Complete your Distribution Request Form as first explained in the General Instructions above.
2. Include a printed (not handwritten) invoice or estimate showing exactly what products or services are being purchased.
3. The invoice or estimate must clearly show the total and final amount due to the vendor or service provider.
4. The invoice or estimate must clearly show that the product or services are for the trust beneficiary.

Note: If you want the check sent to the grantor at the grantor's address, please indicate this on your Distribution Request Form

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B. OPEN-ENDED REQUESTS FOR ONGOING PAYMENTS

For your convenience, ongoing payments can be authorized without the need to send a Distribution Request Form every time you want a payment made.

1. Complete your Distribution Request Form as first explained in the General Instructions above.
2. In any convenient place on the Distribution Request Form, you may create the ongoing authorization by making a note that the payment is "ongoing".
3. An ongoing request will be considered authorization to process all bills from that specific vendor or service provider, but you still need to provide the bills in a timely manner.
4. You may also contact your vendors or service providers and arrange to have your bills for ongoing payments sent directly to us. This is optional, and it is your responsibility to make such arrangements if you want the option.
5. The ongoing payments will continue until you notify us to the contrary.

Once completed, please forward your Distribution Requests by mail to: The Center, 4912 Creekside Drive, Clearwater, Florida 33760; by fax to (727) 497-4739, or by email to distributions@centersmail.com. For your convenience, this same contact information is on the top of each Distribution Request Form.

Please check your requests carefully to ensure that they are complete prior to submitting them. We provide timely notice for deficient requests as a courtesy, but incomplete requests can understandably add additional time to the distribution process.

In addition, please keep in mind the purpose and nature of this trust. Because the trust is designed to maintain eligibility for public assistance, it is not possible to honor some types of requests as a result of their potential negative effect on a beneficiary's public assistance. Following below are some examples of requests that typically must be denied:

1. Requests for items/services currently covered under a beneficiary's public assistance;
2. Requests for cash payments to the beneficiary or representative;
3. Requests that are not clearly for the "sole benefit" of a beneficiary; and,
4. Requests to pay the debts of someone other than the beneficiary.

IF YOU HAVE ANY QUESTIONS ABOUT RECEIVING TIMELY DISTRIBUTIONS, OR IF ANY PART OF THESE INSTRUCTIONS ARE UNCLEAR, PLEASE CALL (727) 894-4489.