



## Supplemental Needs Distribution Guide

The following are examples of allowable distributions under Life's Plan Incorporated Trusts

### **Community Supports:**

- Advocacy, oversight, monitoring or private case management, legal services
- Respite, day care
- Some crisis intervention, guardianship
- Vocational rehabilitation or habilitation not covered by Medicaid or Medicare
- Room and board incidental to long term care or medical care (i.e., a portion of charges for nursing home, CBRF, residential care, etc.), not covered by Medicaid.
- Personal care attendant
- Support and service coordination
- Social services, including supervision and reporting if not covered by Medicaid

### **Recreation & Leisure:**

- Participation in sports, hobbies, recreational events, cultural events
- Vacations and travel
- Club memberships
- Movies (No refreshments, including sodas allowed)
- Television and cable, computer, Internet services, telephone, tablets
- Costs to visiting friends, companions, Guardian
- Musical instruments
- Life coach
- Special occasions

### **Maintenance:**

- Clothing
- Home improvements and repairs
- Furniture and appliances
- Housekeeping services
- Lawn care, snow removal
- Storage
- Income taxes
- Grooming (e.g. manicure; haircut)

### **Transportation:**

- Purchase of a car
- Car repair, maintenance and insurance
- Accessibility-related equipment and modifications
- Bus, rail and cab fare/Uber/Lyft services

### **Medical Care (not covered by Medicaid):**

- Therapies
- Prescription drugs and medications (not covered by Medicaid)
- Medical supplies and equipment
- Assistive technology/devices
- Dental treatment, preventive health and devices
- Eyeglasses, contacts and optometry services
- Medical treatments not medically necessary
- Co-pays, deductibles, etc.
- Housing modifications for accessibility
- Ambulance or other medical transportation

### **Insurance:**

- Life Insurance (MUST be for the benefit of beneficiary, others cannot be designated beneficiary of policy)
- Supplemental health insurance

### **Education & Training:**

- Conferences and seminars
- Publication subscriptions
- Class tuition, books and supplies
- Software
- Music class

**And other expenses to provide dignity, purpose and enjoyment for the beneficiary**

### **THE FOLLOWING EXPENSES CANNOT BE PAID FOR SSI REPIENTS**

### **Supplementary Food and Shelter:**

- Rent
- Groceries
- Cost difference between shared and private room
- Property taxes
- Basic utilities (e.g. heat, gas, electric, water, sewer and garbage removal)

**Note: Any recurring payments or big ticket purchases (e.g. car, TV, furniture) should be reviewed by your Trust administrator before purchasing. Certain distribution requests may require a “denial” by Medicaid or insurance providers to be considered a supplemental need. This is a partial, not exhaustive, list of possible uses of your trust fund assets.**

**Life’s Plan, Inc.**

**901 Warrenville Road, Suite 500**

**Lisle, IL 60532**

**(630)628-7169**

**FAX (630)628-2350**