

PERMISSIBLE DISBURSEMENTS

What the Trust can pay for depends on the types of benefits (e.g., SSI, SSDI, Medicaid, Medicare, Section 8) that the beneficiary receives. Generally, the Trust is much more restricted in the distributions that it can make if the beneficiary receives Supplemental Security Income (SSI)/Medicaid than if he or she receives Social Security Disability Insurance (SSDI)/Medicare.

Generally, particularly if the beneficiary receives SSI, the Trust cannot make disbursements for shelter and food expenses nor can the Trust distribute cash (or cash equivalent items like gift cards) to the beneficiary. ***Additionally, by law, the Trust is limited to distributions that are for the beneficiary's sole-benefit.***

Below are ***examples*** of types of expenses that the Trust can typically make disbursements for. Permissible disbursements, by benefit type, are marked with an "x." This is not an exhaustive list, please contact us if you have any questions about specific types of disbursements. Government rules and laws regarding distributions are subject to change.

Disbursement Examples	Benefit	
	SSI	SSDI
Cash / gift cards		
Food or groceries		X
Restaurant meals		X
Rent / mortgage payments		X
Property taxes		X
Homeowner's / renter's association dues and insurance		X
Utilities: gas, water, electrical, phone, hookup / connection charge		X
Certain household items	X	X
Non-food personal items	X	X
Car and home purchase	X	X
Professional services (e.g., legal, accounting, cleaning)	X	X
Transportation	X	X
Clothing, personal care items, entertainment	X	X
Entertainment, vacations, fitness, hobbies	X	X
Car repairs	X	X
Cable, internet, cell phone	X	X
Medical, dental, orthodontia, medical devices, health insurance, caregiving expenses, not covered by Medicaid or Medicare*	X	X
Education / training	X	X

*Proof of prior billing to Medicaid/private insurance must be included with Disbursement Request.
Recurring/regular payments are not permissible with a Section 8 housing voucher.

10/19