

DISABILITY CERTIFICATION FOR ACCOUNT ELIGIBILITY

This form is provided as a resource to individuals who are NOT currently receiving public benefits and are in need of certifying a disability to open a Springhill Pooled Accounts Trust account. If an individual with a disability is currently receiving public benefits this form is not required. Our mission is to improve the quality of life of people with disabilities by professionally investing assets to plan for the future*, ensuring trust funds are distributed for a beneficiary's sole benefit, and assisting in maintaining public benefits eligibility. Visit our website at <https://springhillpooledtrust.org>.

What is a Springhill Pooled Accounts Trust?

Springhill Pooled Accounts Trust improves the lives of people with disabilities living in Michigan and across the country. Our experienced staff works with individuals to assist in maintaining their eligibility for public benefits and manage their financial assets. As a nonprofit organization, Springhill helps beneficiaries and their families easily access their funds to pay for expenses that improve quality of life, such as clothing, travel, electronics, education, and more.

At Springhill, a dedicated Trust Coordinator will get to know you, your specific needs, and how you'd like to use your sub-account. We also provide free enrollment consultations for potential beneficiaries, trustees, attorneys, and financial planners. Our goal is to simplify the process while complying with federal and state rules governing trusts.

Springhill is an excellent option for people with disabilities who want the reassurance of a professionally administered trust, the advantages of a pooled investment, and our exceptional personal service. We'll handle the details so you can focus on what matters most to you.

Who is eligible?

Individuals with disabilities who are or may become over the means-tested public benefit asset limit. All potential participants should seek professional legal counsel to determine if a special needs trust is right for them.

*Investing involves risk and beneficiaries may incur a profit or loss regardless of the strategy selected, including loss of principal. Required Disclosure: Registration with the SEC authorities as a Registered Investment Adviser does not imply a certain level of skill or training nor does it constitute an endorsement of the advisory firm by the SEC

Disability Certification for Account Eligibility

Individuals who currently receive a monthly benefit from the Social Security Administration (SSA), based on a disability (Social Security Disability Insurance [SSDI], Childhood Disability Benefits, Disabled Widow/Widowers Benefits, or Supplemental Security Income [SSI]) are deemed eligible for a Springhill Pooled Accounts Trust account and are not required to complete this disability certification.

As this applicant's licensed health care provider, I certify, to the best of my knowledge:

1 Please check one

- A. This Individual has a severe medically determinable impairment* that results in marked and severe functional limitations which have lasted or can be expected to last for a continuous period of not less than 12 months and/or can be expected to result in death. I understand that "marked and severe functional limitations" means functional limitations that meet, medically equal, or functionally equal the severity of any listing in appendix 1 of subpart P of 20 CFR part 404 (the "Listing"), but without regard to age. The Listing can be found at www.ssa.gov/OP_Home/cfr20/404/404-app-p01.htm. I further understand that the level of severity is determined by taking into account the effect of the individual's prescribed treatment.
- B. This individual is blind, meaning that [I have] [the beneficiary has] central visual acuity of 20/200 or less in the better eye with the use of a correcting lens. An eye which is accompanied by a limitation in the fields of vision such that the widest diameter of the visual field subtends an angle no greater than 20 degrees shall be considered as having a central visual acuity of 20/200 or less.

2 This Individual has a severe and marked medically determinable impairment or blindness.

3 I am a Medical Doctor (MD), Doctor of Osteopathy (DO), Doctor of Dental Surgery or Dental Medicine, Doctor of Podiatric Medicine, Doctor of Optometry or a Chiropractor licensed to practice as such in the state in which I performed this diagnosis. (Note: Section 529A (e)(2)(A)(ii) does not include a Licensed Psychologist, Clinical Therapists or certified vocational rehabilitation counselor).

As this applicant's (Name): _____ licensed health care provider, I am documenting the Individual's primary diagnosis as required by the Springhill Pooled Account Trust Declaration of Trust

Primary Diagnosis (ICD-10)

Date:

Provider Print Name/Title

Provider Signature

Provider Telephone Number

*A medically determinable physical or mental impairment is an impairment that results from anatomical, physiological, or psychological abnormalities, which can be shown by medically acceptable clinical and laboratory diagnostic techniques. The medical evidence must establish a physical or mental impairment consisting of signs, symptoms, and laboratory findings—not only by the individual's statement of symptoms. 20 CFR 404.1528, 404.1529, 416.928, and 416.929 provide that symptoms, such as pain, fatigue, shortness of breath, weakness or nervousness, are an individual's own perception or description of the impact of his or her physical or mental impairment(s). 20 CFR 416.928 further provides that, for an individual under age 18 who is unable to adequately describe his or her symptom(s), the Social Security Administration will accept as a statement of this symptom(s) the description given by the person most familiar with the individual, such as a parent, other relative, or guardian. However, when any of these manifestations is an anatomical, physiological, or psychological abnormality that can be shown by medically acceptable clinical diagnostic techniques, it represents a medical "sign" rather than a "symptom." (See Social Security Ruling 96-4p)