



Disbursements from the Personal Support Trust

In general, the Beneficiary or Primary Representative may drop off, mail, fax or email The Arc of Northern Virginia Disbursement Request Form and receipt, bill or training invoice to The Arc of Northern Virginia.

Disbursements will be paid from the Beneficiary's applicable trust sub-account in The Arc of Northern Virginia's Pooled Trust Program. The Beneficiary or Primary Representative may request that:

- 1) Recurring bills with equal monthly or quarterly payments may be set up to automatically be disbursed from the trust account. These distributions will be mailed directly to the vendor. , the Beneficiary or Primary Representative;
- 2) With prior notification, monthly routine bills be sent directly to The Arc's trust program to be paid for by the trust. (These may include medical bills, prescription costs, dental bills, cell phone or cable bills, etc.);
- 3) Bills to be paid on a one time basis may be sent directly to The Arc's trust program to be paid by the trust. This can be done by having the vendor mail the invoice or bill directly to The Arc; the beneficiary or representative may drop off, mail in, fax or email the disbursement request and the bill to The The Arc of Northern Virginia;
- 4) For clothing or store purchases a check will be cut from the trust to the designated store. For some beneficiaries, depending on benefits, gift cards may also be requested. Receipts will be required to be sent in for documentation purposes;
- 5) Limited cash amounts be provided – depending on an individual's benefits. If someone is receiving SSI and/or Medicaid restrictions may apply due to the need to maintain such benefits.

All disbursement requests are processed by The Arc of Northern Virginia Pooled Trust Management Team then sent to SunTrust, the Trustee. The checks for the distributions will then be sent by SunTrust to The Arc of Northern Virginia which in turn will mail them to the appropriate vendor or party. Alternative arrangements may be made by contacting The Arc of Northern Virginia.

Personal Support Trust - Examples of Allowable Supplementary Needs

- Community Supports such as:
 - Advocacy, oversight, or monitoring
 - Respite
 - Some crisis intervention, guardianship
 - Some vocational rehabilitation or habilitation
 - Housekeeping services, lawn care
- Recreation and Leisure such as:
 - Participation in sports, hobbies, recreational or cultural events, clubs
 - Vacations and travel i.e. Visiting friends, companionship
- Supplementary food and shelter (occasional and periodic, beyond what is “necessary”), such as
 - Dining out
 - Home improvements and repairs
 - Furniture and appliances
 - Cost difference between shared and private room
- Clothing
- Transportation such as:
 - Purchase of a car
 - Car repair, maintenance, and insurance
 - Accessibility-related equipment and modifications
 - Bus, rail, and cab fare
- Medical items such as certain therapies, medicines, and assistive technology/devices (not covered by Medicaid)
- Insurance such as term life or supplemental health
- Education and Training such as:
 - Conferences and seminars
 - Publication subscriptions
 - Class tuition, books, and supplies
 - Software
- Other expenses to provide dignity, purpose, enjoyment for beneficiary

Note: Disbursement requests require documentation such as receipts. Certain expenses may require prior submission to and denial by a government agency to be considered a legitimate supplementary expense, including;

- Requests for cash or
- Requests for disbursements made payable to the beneficiary
- Disbursement requests for more than \$1000.00

If you are not receiving Means-tested benefits, then there are no restrictions on disbursements