

Guidelines for Disbursement Requests

The trustees will not approve payment of (but not limited to) the following:

1. The trustees will not approve payment of, or re-imbusement for payment of alcohol, smoking materials, cigarettes or cigars.
2. All requests for payment to a vendor must include receipts showing items purchased or services provided.
3. The trustees generally will not approve payment of a new motor vehicle or an expensive used one.
4. The trustees generally will not approve payment of housing costs because such payments may interfere with public benefits eligibility. Also, large expenditures for housing may preclude a sub account from lasting either for the duration of the lifetime of the beneficiary, or for at least 10 years, which is the intended goal of the trustees.

These restrictions will be adhered to except by initial agreement or in extraordinary circumstances; e.g., a good investment after careful consideration by the trustees. The objective of the trustees is to have the beneficiaries' funds last as long as possible for their benefit, taking into account the beneficiary's age and size of the trust with the goal of lasting at least 10 years. The trustees will approve only disbursements that would improve the beneficiaries' quality of life.