

PATRICIA E. KEFALAS DUDEK

& ASSOCIATES

Attorneys at Law

30445 Northwestern Highway, Suite 250

Farmington Hills, Michigan 48334

(248) 254-3462

www.pekdadvocacy.com

http://pattidudek.typepad.com/pattis_blog/welcome.html

Patricia E. Kefalas Dudek
pdudek@pekdadvocacy.com

Maria R. Messina
mmessina@pekdadvocacy.com

Fax (248) 928-9233

Mall Malisow & Cooney, P.C.
Of Counsel
www.theeldercarelawfirm.com
(248) 538-1800
Fax (248) 538-1801

Tali F. Wendrow, PLLC
Of Counsel
twendrow@pekdadvocacy.com

SPECIAL NEEDS TRUST
LIST OF PERMISSIBLE DISTRIBUTIONS

The Trustee(s) of a Pooled Account Trust may utilize any of the foregoing listing for expenditures from the Trust. The following list of non-support items is provided for purposes of description and shall not limit the Trustee(s) in making other distributions for other items of amenities that the trustee may believe are in the best interest of the beneficiary. Those items may include, but are not limited to:

1. Automobile/Van
2. Accounting services
3. Acupuncture / Acupressure
4. Alterations or mending to clothing – shoe repairs
5. Appliances (TV, VCR, stereo. Microwave, stove, refrigerator, washer/dryer and maintenance/repairs)
6. Bottled Water or water service
7. Bus pass/public transportation costs
8. Camera, film, recorder and tapes, development of film, photo albums, scrapbooks and supplies
9. Clothing
10. Clubs and club dues (record clubs, book clubs, health clubs, service clubs, zoo, Advocacy Groups, museums)
11. Computer hardware, software, program, maintenance/service
 - a. Internet service
12. Conferences and travel related to same
13. Courses or classes (academic or recreational) including supplies
14. Curtains, blinds, drapes and the like
15. Dental work not covered by Medicaid, including anesthesia.
16. Down payment on home or security deposit on apartment.
17. Dry cleaning and/or laundry services and/or supplies
18. Elective surgery
19. Fitness equipment
20. Funeral expenses
21. Furniture, home furnishings and insurance
22. Gasoline and/or Maintenance for automobile
23. Haircuts / Salon services

24. Holiday Decorations, parties, dinner dances, holiday cards
25. Home alarm and/or monitoring/response system
26. Home improvements, repairs and maintenance (not covered by Medicaid), including tools to perform home improvements, repairs and maintenance by homeowner
27. Home Purchase (to the extent not covered by benefits)
28. House cleaning / maid services/lawn services/snow removal
29. Independent Care Managers/Case Managers
30. Insurance (automobile, home and/or possessions)
31. Insurance Co-Payments not covered by any other source
32. Legal Fees/Advocacy
33. Linens, towels, bedding and other household furnishings
34. Massage, facials and other similar services/treatments
35. Musical instruments (including lessons and music)
36. Non-food grocery items (laundry soap, bleach, fabric softener, deodorant, dish soap, hand and body soap, personal hygiene products, paper towels, napkins, kleenex, toilet paper, any household cleaning products)
37. Over the counter medications (including vitamins and herbs, etc.)
38. Personal Assistance Services not covered by Medicaid
39. Pet and pet's supplies, veterinary services
40. Physician specialists if not covered by Medicaid
41. Private counseling if not covered by Medicaid
42. Repair services (appliance, automobile, bicycle, household, fitness equipment)
43. Snow removal/Landscaping/Lawn Service
44. Sporting goods/equipment/uniforms/team pictures/travel to games/tournaments
45. Stationary, stamps, cards, etc.
46. Storage Units
47. Taxi cab
48. Telephone service and equipment, including cell phone, pager, etc.
49. Therapy (Physical, Occupational, Speech) not covered by Medicaid.
50. Tickets to concerts or sporting events (for beneficiary and an accompanying companion)
51. Transportation (automobile, motorcycle, bicycle, moped, gas, bus passes)
52. Utility bills (direct TV, cable TV, electric, heating)
53. Vacation (including paying for personal assistance to accompany the beneficiary)

Examples of Trust Distributions which will Reduce SSI Benefit

1. Basic shelter related expenses
2. Food
3. Cash for any purpose

Examples of Impermissible Trust Distributions

1. Paying for a service already paid for by another source
2. Distribution not in the best interest of the beneficiary (made primarily for the benefit of another person)

02/01/10