

## MONTANA FAMILIES TRUST

### USE OF FUNDS

The Trust allows families and individuals to save funds – either for the near future or decades from now – to pay for many supplemental services, supports, activities and purchases that improve an individual’s quality of life.

Withdrawal from the individual trust accounts are referred to as disbursements. Disbursements from the accounts are as varied as the interests of the individuals enrolled in the program, but they all have one purpose: to enrich the life of the Beneficiary.

### Some uses of trust funds may include:

- Education, information and training opportunities
- Assistance with personal care, skill building, financial management, medical monitoring, meal preparation, shopping, home maintenance and house cleaning.
- Unusual or extraordinary disability related shelter expenses
- Capital expenses, including environmental modifications
- Respite care
- Disability related support groups
- Transportation costs
- Vacation, travel and recreation
- Employment supports and tuition
- Advocacy and legal services
- Social productivity and personal fulfillment activities, such as volunteering, club membership and recreation
- Assistive technology, including computers and electronic equipment
- Clothing
- Medical care, counseling, therapies and other health related services including alternative practitioners not covered by public benefits
- Birthday and holiday presents for the Beneficiary to give to others
- Individual trust account expenses, including: enrollment, bookkeeping, tax return preparations and filing, tax payments, annual management expenses and other trust related fees.
- Pre-paid burial expenses – 1<sup>st</sup> Party Funded Trust\*
- Items the Trust Manager deems appropriate and reasonable within the guidelines of the Montana Families Trust Committee.

\* Funds cannot be disbursed for related services to the Beneficiary after the Beneficiary has passed away, therefore, we encourage pre-planning related to burial and funeral expenses.