

**Pooled Trust Q & A:****Defining Supplemental Needs**

Q: How are Supplemental Needs defined ? For what types of items and expenses can you make distributions?

A: In simplest terms Supplemental Needs are defined as ‘non recurring, varying amounts’ expenses. For example, rent and utilities are paid through the SSI check, not the trust sub-account.

Here are the relevant sections from the The SMB Special Needs Pooled Trust:

5.3 Distributions Not to Replace Assistance. Distributions from this Trust should not be made to, or for the benefit of, a Beneficiary if the effect of such distribution would be to replace, or to disqualify a Beneficiary from receiving, Government Assistance. The Trust corpus and income is specifically not available to any Beneficiary except to the extent of distributions made by the Trustee to a Beneficiary. No distributions should be made by the Trustee to, or for the benefit of, a Beneficiary in excess of resource and income limitations of any public benefit program to which the Beneficiary is entitled. The Trustee may, but is not required to, consider the future needs of a Beneficiary when making distributions or when considering requests for distributions. The Trustee should refuse any request for payments from this Trust for services that any public or private agency has the obligation to provide to Beneficiaries who otherwise qualify for such assistance.

5.4 Examples of Appropriate Distributions. Appropriate Non-support payments to, or for the benefit of, a Beneficiary, include, but are not limited to, payments for any of the following purposes:

- a) medical, dental, and diagnostic work and treatment for which there are no available private or public funds;
- b) medical procedures that are desirable in the Trustee's sole discretion, even though they may not be medically necessary or life saving;
- c) supplemental nursing care, rehabilitative and/or occupational therapy services;
- d) differentials in cost between housing and shelter for shared and private rooms in institutional settings;
- e) care appropriate for a Beneficiary that assistance programs may not or do not otherwise provide;
- f) expenditures for travel, companionship, and other expenditures that will improve the quality of a Beneficiary's physical, emotional, psychological, and/or spiritual life