

Heartland Fiduciary Services

List of Allowable Expenses

Special Needs Trust

- Pet expenses-subject to annual limits
- Trips or vacations
- Clothing
- Furniture
- TV, Computers, Cell phones and other electronic devices
 - Replaced once every 3 years
- Medical or health services not covered by insurance
- Home modifications
- Legal and professional fees
- Caregiving not covered by insurance
- Educational expenses
- Vehicle purchases and vehicle modifications

Special Needs Trusts Cannot

- Provide cash
- Pay for rent, groceries and other day-to-day living expenses
- Reimburse purchases that did not have prior approval
- Pay for expenses that are regular and recurring like a monthly cell phone bill
- Disburse funds more than \$1,000 without Court approval