

Heartland Fiduciary Services

Rep Payee Client Information

- ❖ The email address for all requests for Rep Payee clients is info@heartlandfid.com.
- ❖ Go to www.HeartlandFid.com and visit the Trust and Rep Payee page for an online form to submit requests for purchase and extra funds.
- ❖ Starting March 1, 2026 email requests for funds, bills and paperwork need to be sent to info@heartlandfid.com. Anything sent to erin@ccmiowa.com will be deleted.
- ❖ This mailbox is monitored M-F from 9am to 4pm by the fiduciary assistants.
- ❖ Bills are paid Mondays and Fridays.
- ❖ Deposits to True Link cards may arrive the next business day, or between 2 and 5 days later depending on what they are and when they are processed. Check the balance before heading out to buy things.
- ❖ Receipts must be received at least quarterly for purchases over \$50. True Link has an app where receipts can be uploaded. They can be mailed to **PO BOX 5787 Coralville IA 52241**, **faxed to 319-359-6980** or emailed to info@heartlandfid.com.
Cell phone photos are not accepted.
- ❖ Failure to provide receipts may result in weekly spending amounts being lowered until they are provided.
- ❖ HFS reserves the right to place spending restrictions on personal needs funds.
- ❖ HFS reserves the right to pay for purchases directly instead of providing cash or deposits to cards.

- ❖ Requests for additional funds not spent on their stated purposes may result in denials of future requests for the same items.