



## Our Gifts Policy

**Effective January 2019, we will no longer approve any request for gifts of any kind.**

*This last year in an update, the SSA put a great deal of emphasis on the “Sole Benefit” rule. This means that moneys in the trust are intended to be used for the sole and exclusive benefit of the beneficiary. Gifts for others do not solely benefit the beneficiary.*

*There are some exceptions when it comes to collateral benefits. For example if a beneficiary cannot travel without a companion the companion’s expenses can be paid for by the trust.*

12/13/2018