

Charitable Trust of the Midwest Special Needs Trust

April 24, 2014

Charitable Grant Awards

- Up to \$1000 paid to vendor/provider directly
- Only for goods and services prospectively based on estimate or treatment plan
- Two categories
 - Urgent/denial
 - Twice a month
 - Staff review
 - General
 - Quarterly
 - Board review



Eligibility

- Disability determined by SSA verified by -
 - SSI for disability
 - SSDI
- Income eligibility based on Federal Poverty Guidelines updated each fiscal year
- Need demonstrated by treatment plan, estimated cost and application
- US citizen and Missouri resident
- No CT grant award in previous 12 months

Charitable Grant application*

- **Completed & signed application form**
- **Proof of disability**
- **Proof of income**
- **Estimate/treatment plan**

MSNT will only consider complete applications!

Review Principles



- Grant award covers full cost of applicant need(s)
- Matching funds from applicant or others
- Provider offers discounted service
- Grant would be cost effective in reducing future needs
- High-value outcomes
- One-time expenses, not ongoing commitments
- Supplements but does not supplant Medicaid or Medicare coverage

Exclusions

- Services already purchased or provided
- Application is incomplete or unsigned
- Applicant or any member of the household has been disqualified from receipt of federal benefits due to a finding of fraud or failure to report to public benefit authorities
- Request to reimburse another party for requested goods/services
- Experimental or cosmetic
- Applicant benefits have been reduced or suspended due to overpayment
- Applicant fails/refuses to provide household information or income
- Applicant has history of felony convictions
- Applicant is in jail/prison
- Request is for vehicle, rent, utilities, groceries, cell phone
- Covered by Medicaid, Medicare or other insurance

Lower priority if -

- Requested items are disposable and will need to be re-supplied continually for lifetime
- Vehicle repair, parts, fuel or mileage, even for medical care
- Item is available through accessible public venues such as books, equipment loan programs
- More readily available through other charitable entities and not disability-related such as clothing or shoes
- Applicant has failed to properly care for and protect similar assets or resources demonstrated by repeated or willful loss/destruction of personal property

Annual Distribution Formula

- Approved by the Board each fiscal year
- Total distributions = 50% of the charitable remainder + 100% dividends and public contributions
- For FY 14, \$137,859 available for distributions



Annual CT Award History

Fiscal Year	Awards	Amount Available for use
FY 2014		\$137,859
FY 2013	86 awards	\$58,693
FY 2012	124 awards	\$74,303
FY 2011	199 awards	\$114,181
FY 2010	160 awards	\$98,013
FY 2009	168 awards	\$92,696

Opportunities


- Flexible program
- Greater emphasis on quality of life & independence
- Partnership potential



MSNT Board encourages & Invites -

- Supplement to waiver budgets for ISL for appliances or adaptive equipment
- Tuition and costs with programs like CMU DD program
- Conferences for parents and PWD related to self determination and advocacy
- Wonderland and other recreational or therapeutic camps
- Ramps, lifts and other adaptive equipment to assist with community living as alternative to institutions
- Communication and assistive devices not covered by Medicaid or waiver

Remember -



- Donations are welcome!
- Special Needs Trust administration supports Charitable Trust
 - MSNT is an affordable SNT option for 1st and 3rd party trusts
 - Referrals are welcome
 - Donor can increase remainder to CT or name other charitable purposes as remainder beneficiaries
- Contact MSNT for to arrange for presentations and exhibit opportunities



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