## JLA Special Needs Trust Spending Plan

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Age:

#### **SPENDING PLAN GOALS**

The following information will be helpful in understanding how the trust will meet the needs of the Beneficiary. Please complete and return this form to a JLA Trust representative.

- 1. What are your primary goals for this Trust in terms of ensuring health & safety, maximizing independence, and living a high quality of life?
- 2. I would like my Trust to last for \_\_\_\_\_years.
- 3. I would like my annual budget to be \_\_\_\_\_ dollars.

# MONTHLY RECURRING EXPENSES – DOES NOT EFFECT BENEFITS

Please include any recurring monthly expenses that you would like the trust to pay for. Please note that some items may affect your eligibility for government benefits if paid by the trust.

Rent /Utilities		
Rent	\$	
Phone / Cell Phone	\$	
Cable / Internet	\$	
Food / Household Expenses		
Repairs	\$	
Supplies	\$	
Furnishings	\$	
Appliances	\$	
Gardening services	\$	
Groceries	\$	
Restaurants	\$	
Personal / Medical Care		
Medications	\$	
Personal hygiene	\$	
Other personal / medical care	\$	
Insurance		
Life	\$	
Medical	\$	

Transportation / Auto		
Gas	\$	
Repairs	\$	
Tolls	\$ \$	
License and registration	\$	
Insurance	\$	
Public transportation	\$ \$	
Taxis, etc.	\$	
Loan payment	\$	
Other	\$	
Clothing		
Clothes	\$	
Entertainment		
Movies, concerts, museums, etc.	\$	
	\$	
Travel		
Air, train, etc.	\$	
Other		
	\$	

MONTHLY DISBURSEMENT TOTAL: \$\_\_\_\_\_

#### FOR SSI RECIPIENTS MONTHLY RECURRING EXPENSES - MAY AFFECT BENEFITS IF PAID BY TRUST

Housing		
Mortgage	\$	
Insurance	\$	
Taxes	\$	

Utilities	
Heating	\$
Electricity	\$
Trash/Garbage	\$
Water	\$
Sewer	\$

### MONTHLY RECURRING EXPENSE TOTAL: \$\_\_\_\_\_ (Housing, Utilities, only)

### ANTICIPATED ONE-TIME EXPENSES

Please include any one-time expenses that you would like the trust to pay for in the near future. This list does not need to be comprehensive, but it will help us think about your cash needs over the next couple of years. We have provided a few examples below.

One-time expenses	Amount	Anticipated date
Example: New computer	\$1200	Within the next year
Example: New running shoes	\$250	Next two months
Example: Dental work not pd with Medi-Call	\$1000	Spring 2025
Example: Credit card debt	\$150	March 2025

## ANTICIPATED ONE-TIME DISBURSEMENT TOTAL: \$\_\_\_\_\_