



TRUE LINK CARD RULES ACKNOWLEDGEMENT

- **The card cannot be used for cash.**
- Requests are not approved automatically. All requests MUST BE PRE-APPROVED BY THE TRUSTEE, THIS CAN TAKE 2-3 BUSINESS DAYS TO PROCESS
- Card must be used primarily for the beneficiary (not for gifts or for other family members or friends).
- Please keep all receipts for future reference.
- Pre-approved categories and amounts are based on Spending Plan.
- Generally \$200 maximum per purchase unless previous arrangements have been made.
- If on SSI, no money can be used for basic utilities (and rent in some cases) unless a separate waiver is signed.
- The first card is free, there's a \$5 card replacement charge (\$30 for expedited service).
- If you want the trust to pay for an item or service outside of the monthly allowance, we must receive written/photo documentation such as an estimate or invoice, listing complete charges including taxes, delivery, etc.
- If rules are broken three (3) times, card use can be suspended.

Signature of beneficiary (or legal representative)

Date (month/day/year)