**TRUSTEE *MAY* LIST**

It is critical that the trustee of a special needs trust understand what expenditures are appropriate and what expenditures could result in the beneficiary losing vital government benefits. Below is a brief guide to help you make only permitted expenditures.

The trustee ***may*** spend trust funds to:

* Pay third party vendors for services or goods for example:
  + Laundry service
  + Taxi services
  + Home cleaning
  + Caregivers
  + Computer repair people
  + Car mechanics
* Pre-pay vacation expenses for the beneficiary (and a companion, in certain situations).
* Purchase items like computers, televisions, and iPods for the trust beneficiary.
* Purchase only gift cards which cannot be sold or traded for cash.
* Pay for education and educational related expenses other than food and shelter.
* Pay monthly bills like cable and telephone, but not power, water, and garbage unless it is reported to the Social Security Administration, which will deduct a certain amount each month those bills are paid.
* Pay the rent, utilities, and property taxes of the trust beneficiary; however, this will trigger a reduction in Supplemental Security Income benefits.
* Pay for medical services/devices not covered under Medi-Cal or Medicare.
* Pay automobile: insurance, taxes, licenses and fees.
* Pay for items on your own credit card which are not classified as shelter or food.
* With trust assets, purchase a home and gift it to the trust beneficiary.
* Purchase a vehicle and gift it to the trust beneficiary.
* Cover all other expenses not met by public benefits.

Please note that all of these services, items, and/or situations are examples of Social Security approved payments that could be issued with the funds in a Special Needs Trust and not a guarantee that the Trustee will agree to the disbursement of monies for these purposes.