



Community Fund Management Foundation

Trust Distributions

Trusts administered by CFMF are discretionary trusts, meaning that CFMF as Trust Advisor has the sole authority to approve or deny a distribution request. This sheet is intended to assist Designated Advocates in identifying the types of requests that may be approved or denied. The laws and policies that govern CFMF and government benefits are subject to change at any time and without notice. Designated Advocates are welcome to contact CFMF's Distribution Department to seek guidance on what may or may not be approved by CFMF.

Examples of common distribution requests that may be approved:

- Medical expenses and equipment not covered by insurance
- Personal services, such as nursing and attendant care or housecleaning
- Clothing
- Home furnishings and electronics such as furniture, television, cell phone, and computer
- Household supplies such as tissues, paper towels, laundry, and cleaning supplies
- Educational expenses that are not the responsibility of a parent or guardian
- Travel and vacations (including the travel expenses for one companion if the Distribution Request includes a doctor's statement that such assistance is mandatory)
- Transportation expenses, including auto insurance, gasoline, and vehicle maintenance
- Technology expenses such as cable, internet, and cellular phone service
- Expenses related to hobbies, sports, recreational activities, or entertainment
- Pet care
- Legal fees, court costs, and income taxes
- Subscriptions to magazines and newspapers
- Membership dues including gym, recreational center, and book clubs
- Attendance at seminars, concerts, movies, and cultural events
- Irrevocable burial expenses
- Personal grooming, such as salon or barbershop services

Examples of distribution requests that are likely to be denied:

- Gifts for third-parties regardless of cost or value
- Medical expenses that are covered by insurance such as Medicare or Medicaid
- In-Kind Income,¹ such as food,² shelter,³ or something which can be used to get food or shelter (such as gift cards)

¹ See Ohio Admin. Code 5160:1-3-03.1(B)(2).

² "Food" includes grocery store purchases and restaurant dining.

³ "Shelter" includes room, rent, mortgage payments, real property taxes, heating fuel, gas, electricity, water, sewerage, and garbage collection services, as well as homeowner's insurance if required by mortgagee. See 20 C.F.R. 416.1130(b), POMS SI 00835.465, and Ohio Admin. Code 5160:1-3-03.8(B)(10).