



Community Fund Management Foundation

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Where Quality of Life Matters

Welcome to Community Fund Management Foundation (CFMF). This Designated Advocate Information Packet is meant to assist Designated Advocates in understanding the distribution process and the responsibilities of a Designated Advocate.

The Distribution Request and the Beneficiary Resource Record forms may be printed from our website (www.cfmf.org). Please call our Administrative Office if you require the forms to be mailed or emailed to you.

Responsibilities of the Designated Advocate

1. Submit and sign distribution requests in the best interest of the beneficiary.
2. Know the benefits, income, and medical insurance received by the beneficiary and be able to accurately complete and submit the Beneficiary Resource Record.
3. Receive tax documents issued by the Trustee.
4. Notify CFMF of any address changes for the grantor, designated advocate, and beneficiary in writing.
5. Receive paper or electronic statements.
6. Contact CFMF if any third-party, including a government agency or attorney, requests information regarding the trust and provide consent for CFMF to disclose information.
7. Notify CFMF of the beneficiary's death and, if needed, assist CFMF in closing the trust.

Distribution Process

The distribution process takes approximately 2 – 4 weeks from the first business day that CFMF receives the Distribution Request to the date the check is received.

1. The Designated Advocate must mail or fax a Distribution Request Form to CFMF's Administrative Office to initiate the distribution process. Our address and fax number is at the top of this page. The Distribution Request may be submitted at any time; there is no need to wait until the beginning of the month.
2. The Designated Advocate must also submit a Beneficiary Resource Record (BRR) with the Distribution Request if: (1) it is the first Distribution Request; (2) any information has changed since the last BRR was submitted to CFMF; or (3) more than 12 months have passed since the last BRR was submitted to CFMF.
3. Upon CFMF's receipt by mail or fax, the Distribution Request will be processed and a receipt letter will be sent to the Designated Advocate by mail to the address on file.
4. The Distribution Request and BRR are sent to the Review Committee for approval.
5. CFMF will send an outcome letter to the Designated Advocate after the Review Committee makes a decision.
6. CFMF will direct the Trustee to issue and mail a check for all approved distributions pursuant to the information on the Distribution Request.

Helpful Tips for Successful Distribution Requests

Designated Advocates can help CFMF process the distribution requests efficiently by:

1. Submitting clear, legible, and complete Distribution Request forms.
2. Attaching supporting documentation, such as invoices, receipts, and quotes.
3. Confirming a current BRR is on file with CFMF.
4. Identifying on the Distribution Request whether the request is a direct payment, reimbursement, or advance.

Common Questions

Q: What do all of these terms mean?

A: CFMF is the **Trust Advisor**. Our duties are included in the Trust Agreement and we handle the daily administration of the trusts. Our primary focus is reviewing and either approving or denying all distribution requests. Equity Trust is the **Trustee**. It is responsible for many things also identified in the Trust Agreement, including issuing checks for approved distribution requests and account statements. Vantage Financial Group is the **Third Party Administrator** and **Registered Investment Advisor**. Equity delegates some of its duties to Vantage Financial Group, including daily balancing of the accounts, preparing tax forms, investment management, and maintaining the account website located at www.cfmfonline.org.

The **Beneficiary** is the person with a disability who benefits from the trust. The **Designated Advocate** is selected by the person who established the trust and communicates with CFMF and the Trustee on behalf of the Beneficiary; the Beneficiary may serve as his or her own Designated Advocate if he or she is a competent adult who can adhere to CFMF's procedures. The **Grantor** is the person who establishes the third-party Master Trust.

Q: I am not clear on how to complete the forms. Where do I start?

A: Please feel free to call our Administrative Office and ask to speak to the Distribution Department. While we cannot provide you with advice, we will be happy to explain the terminology and provide recommendations on how to complete the forms.

Q: Where can I find the Agreement Number? Is that different from the Account Number?

The Agreement Number is assigned by CFMF and is comprised of 1-2 letters and 8 numbers. For example, P13-13-1229 or JP21-19-3587. The Agreement Number is located on the first page of the approved Joinder Application and on the majority of correspondence from CFMF. The Account Number is assigned by the Trustee and is stated on the account statements. Our current Trustee assigns a 7-digit account number. For example, 1559000 or 5003152.

Q: Will CFMF accept a distribution request by phone or email?

A: CFMF will not consider a verbal distribution request, nor will CFMF complete a distribution request form for you. All distribution requests must be submitted in writing by fax or mail on the CFMF Distribution Request Form. We do not accept email submissions at this time.

Q: Where can I find more forms?

A: You can download all of our forms, including the Distribution Request form and BRR, directly from our website at www.cfmf.org. Designated Advocates may also request copies be mailed or emailed to them by calling our Administrative Office at 216-736-4540.

Q: Is there a minimum or maximum I can request from the Trust?

A: No. CFMF will not approve a distribution if it exceeds the balance in the sub-trust for the beneficiary, but otherwise there is no minimum or maximum dollar amount.

Q: Where do I send the completed Distribution Request Form or BRR?

A: You may submit by mail or fax to our Administrative Office: CFMF, 17900 Jefferson Park, Suite 102, Middleburg Heights, OH 44130; Fax: 216-867-9783.

Q: Why did I receive an outcome letter that said the distribution was not approved?

A: If it only shows not approved and no other notes are attached to that same line, then the request is not back from the Review Committee or you sent a second request before the first request was approved. You will receive further outcome correspondence after the Review Committee submits its decision.

Q: Why did I receive a receipt letter requesting a different payee?

A: We are requesting that you call CFMF and provide us with a different payee name. CFMF will not issue checks to the beneficiary.

Q: Why is it that I requested a payment to be made on a monthly basis, but it did not say that on the description line?

A: Please make sure that you check the “monthly payment” box on the Distribution Request form and include a start and end time when requesting ongoing payments. (Example: To start January 2017 and end in June 2017.)

Q: Why was the Distribution Request form was returned to me?

A: CFMF will attempt to reach the Designated Advocate by phone, but if there is no response within a reasonable amount of time, CFMF will return the distribution request with a denial letter. Please correct the information and send back for processing.

Q: Why was the Distribution Request Form I submitted denied?

A: CFMF and the Review Committee will approve or deny distributions based on current laws, regulations, and policies. There is no guarantee that a distribution request will be approved.

Q: The distribution check was issued, but the check is no longer needed. What do I do?

A: Please return the check to CFMF’s Administrative Office and we will re-deposit it in the trust account. The Trustee may charge a fee for re-depositing the check.

Q: The distribution check was issued, but it was lost. What do I do?

A: Please contact CFMF’s Administrative Office and we will notify the Trustee to issue a stop payment and, if needed, re-issue the check. Our Trustee may charge a fee for issuing a stop payment and/or re-issuing the check.