

By Their Side has prepared this sample letter for families to tailor and provide to Trustees who are otherwise unable to monitor the financial needs of the beneficiary. (A By Their Side Advocate will communicate financial needs to the Trustee.)

Date

Suggested Recipients:

1. Coordinator of Community Services Agency
2. Residential Agency

To whom it may concern,

I am the Trustee of the Special Needs Trust for the benefit of _____ . This Trust was established by (name, relationship) for the purpose of _____ (eg assuring that his/her healthcare and personal needs are addressed, that opportunities continue to be provided to participate in preferred activities and that new life enrichment opportunities be offered.) While the Trust is a financial resource of last resort, to be utilized after available insurance benefits and public resources, it is intended to be accessed to enhance (name)'s quality of life.

I would like to be notified as soon as such financial needs arise. Please contact me at (email or phone). In order to disburse funds, I will need to pre-approve the purchase. A written request outlining purpose, vendor, and estimated cost from vendor will be necessary. Thank you for your assistance on _____'s behalf.

Sincerely,

Trustee