

DUTIES & RESPONSIBILITIES OF BENEFICIARY ADVOCATE



Empowering individuals with disabilities to live their fullest life. John 10:10

BENEFICIARY NAME:		ACCOUNT NUMBER:	
BENEFICIARY ADVOCATE NAME:			

As Beneficiary Advocate, you are agreeing to act on behalf of the Beneficiary and your actions must be solely for his/her benefit. Please review the list of responsibilities below and ensure that you are able to perform these duties and will fulfill them to the best of your abilities. This is not an all-inclusive list and additional responsibilities may be required of you.

1. Continually assess the supplemental needs of the Beneficiary. When there is a need for allowable distributions, submit a *Disbursement Request Form* to FLC;
2. Provide FLC with timely and accurate receipts, invoices, estimates, proof of payment and/or other supporting documentation of disbursements;
3. Ensure all funds distributed from the trust sub-account are for the sole benefit of the Beneficiary; *The use of funds in a manner not approved by FLC may jeopardize the Beneficiary's eligibility for government programs. No funds can be used for the Beneficiary Advocate's own benefit. If the funds are used improperly, the Beneficiary Advocate may be required to repay improperly used funds and may be removed as Beneficiary Advocate.*
4. Update FLC throughout the year as any changes occur;
5. Notify FLC promptly upon the Beneficiary's death and provide a certified copy of the death certificate;
6. Establish a positive work relationship with FLC for the benefit of the Beneficiary by maintaining an open door of communication;
7. Comply with all policies and procedures of FLC concerning the Beneficiary's trust sub-account and the underlying Master Trust. I understand there may be unilateral changes by FLC from time to time and I will be notified of changes in writing.

By signing this form, I accept the responsibility of serving as a Beneficiary Advocate for the above-named Beneficiary.

Date: _____

Beneficiary Advocate Signature

"My purpose is to give life in all its fullness" – John 10:10

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