



True Link Visa Prepaid Card
USER ACKNOWLEDGMENT FORM

The re-loadable True Link Visa Prepaid Card's online dashboard enables The Arc of Bristol County, Inc., Trustee and Bristol Wealth Group, Financial Trustee to make disbursements for certain approved purchases. It also allows beneficiaries and their representatives the freedom to purchase approved items and services that can help enhance their quality of life. Please read the rules below & sign this acknowledgment form.

Terms of True Link Visa Prepaid Card Use

- You are agreeing to the \$12.00 monthly fee, which will be withdrawn from your trust account every month. The amount of the monthly fee is subject to change.
- If your card needs to be replaced, there is a \$5.00 replacement fee. The amount of the replacement fee is subject to change.
- It can only be used to purchase items or services deemed permissible by The Arc of Bristol County Trust Services Department (*please review the list of permissible items and services below*).
- It cannot be used to pay for items that are not in the best interest of the beneficiary or for anyone other than the beneficiary, as deemed by the Trust; this may result in certain restrictions that prevent the purchase of items or services on the permissible list.
- It cannot be used to access cash in any way.
 - No cash withdrawals at ATMs, in banks, or after a purchase
 - It cannot be resold or transferred for cash
 - It cannot be used to draw funds independently from the Trust account
- It cannot be used to pay for a service already paid for by another source.
- It cannot be used to purchase items considered in-kind support and maintenance by the Supplemental Security Income (SSI) program (i.e., food, beverages, housing or housing related expenses).
- The intent of the True Link Visa Prepaid Card is that at all times, when it is in the beneficiary's possession, it cannot be used for food, beverages, housing or housing related expenses. If there is any attempt to evade these restrictions, your card will be deactivated and there could be severe negative consequences for your benefits.

- All purchases made using the True Link Visa Prepaid Card must be made for the sole benefit of the beneficiary. It is not to be used to purchase things for others or to pay tips.

Receipts are required

- The beneficiary is responsible for obtaining & saving *all detailed* receipts from purchases made with the True Link Visa Prepaid Card. The receipts must be legible (be sure to protect the receipts from damage) and include the date, have a description of the items purchased, price of each item, and all of the order total details.
- All receipts should be returned to The Arc of Bristol County Trust Services as soon as possible. They can be emailed, faxed or mailed in.
- Failure to send receipts in a timely manner will lead to a delay in your next disbursement or suspension of your True Link Visa Prepaid Card. We will not process your next request until we have received the receipts from your last request.

Funding schedule

- The True Link Visa Prepaid Card will be loaded with funds within 5-7 *business* days from the time we receive your request.

ALLOWABLE EXPENDITURES Below are some examples of allowable and non-allowable expenditures. **Please note that these are not all-inclusive lists. Restrictions may change when there are changes to Trust law and/or Social Security and MassHealth/Medicaid rules and regulations. Please note payments are never made to the Beneficiary.**

- Appliances/electronics (microwave, stove, refrigerator, washer, dryer, cameras, TV, DVD players, cell phones, stereo, computer, computer software, gaming systems, printer, scanner, maintenance)
- Books
- Cable/internet bills; phone bills, pre-paid phone cards
- Clothing, coats, jackets, shoes, boots, sneakers, etc.
- Conferences and travel
- Courses or classes (academic or recreational), including supplies
- Entertainment: club dues, zoo/museum passes, concert, movie, or sports tickets
- Fitness-related expenses
- Home furnishings and decor: bedding, blinds, curtains, furniture, linens, towels, wall art, etc.
- Haircuts, salon services, massages, facials, and other similar services (excluding tips)

ALLOWABLE EXPENDITURES *continued*

- House cleaning/maid services, laundromat, and dry cleaning services
- Housing-related expenses (real estate taxes, homeowner insurance, utility bills, landscaping, snow removal, etc.) ****Only for those not receiving SSI and whose home is not being rented out.***
- Independent Care Managers/Case Managers
- Insurance (automobile, home ***(if not receiving SSI)*** and/or beneficiary's possessions)
- Legal fees, advocacy, professional services
- Medical and dental services or equipment not covered by insurance (including physical therapy); over-the-counter medications; eyeglasses, contacts, hearing aids (not including batteries)
- Non-food grocery items (laundry soap, bleach, fabric softener, dish soap, personal hygiene products, paper goods, and cleaning supplies)
- Pet supplies, veterinary services
- Pre-paid funeral and burial expenses (including pre-paid headstone and engraving)
- Subscriptions: magazine, newspaper, Netflix, Hulu, Amazon Prime, etc.
- Transportation: medical transport (not covered by insurance), public transportation and ride-share services (excluding tips), gas and maintenance costs for automobiles, and bicycles.

NOT ALLOWED

- Alcohol, cigarettes, gambling, lottery tickets (including scratch tickets)
- Payments to the Beneficiary
- Rent, mortgage, room and board, base rate for a residential facility (including group, nursing or assisted living)
- Groceries/food and beverages (including fast food, restaurants, and snacks) ****If you are not on SSI, dining out and snacks are allowed occasionally.***
- Charitable donations, gifts, gift cards, greeting cards (birthday, holiday, etc.), tips
- Flowers (for funerals, gravesites, landscaping, or as gifts to others)
- Loan payments (all types)
- Minimum payment due and account balance for credit cards
- Recreational vehicles (e.g. boats, ATVs, etc.)
- Utilities and housing-related costs (including electricity, water, wastewater, trash, natural gas, real estate taxes, homeowner's insurance, landscaping, etc.) ****If you are not on SSI, these may be allowed in certain circumstances.***
- Firearms (including parts, ammunition, BB guns and accessories), other weapons



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By signing this document, I am acknowledging that I have read and understand the True Link Visa Prepaid Card User Acknowledgment Form. If these rules are not followed or if the True Link Visa Prepaid Card is misused in any way, privileges will be revoked.

Printed Name (Beneficiary, POA or Personal Representative)

Signature (Beneficiary, POA or Personal Representative)

Date

Please remove and return this signed True Link Protection Visa Prepaid Card User Acknowledgment form to:
The Arc of Bristol County
Attn: Trust Services
16 Hillside Avenue
Attleboro, MA 02703