Life's Plan Inc. Request Form Instructions

The Beneficiary or their Guardian or the Special Trustee may be authorized or assigned by the Life's Plan Inc. Administrative staff to initiate a request on behalf of a beneficiary for Disbursement.

Each request must include a Life's Plan Inc. **Request for Disbursement Form** along with proper documentation such as a receipt(s) and invoice(s) to be approved for direct payment to a vendor, reimbursement to whom the request is made, unless directly from the beneficiary. The Life's Plan Inc. trust administrative staff will review all disbursement requests and if approved will request issuance of payment within five business days after receipt of request, not including mail delivery time.

Request forms can be submitted through the Life's Plan website under Resources/Request form, or by email, fax or mail with receipts. The only exception to receipts/invoices not submitted is when seeking a particular advanced purchase that the trust will make directly to a vendor due to the beneficiary's or their personal agent's inability to afford the purchase on their own.

Request Form Requirements:
Beneficiary Name- *MUST* be clearly written on the top of the request form, if it does not have a beneficiary name listed on the form it will not be processed under any circumstance.
Clearly write beneficiary Phone Number- Must on the form, if phone number is not correct on request form or is unfamiliar to the Life's Plan Inc. Staff. Life's Plan will contact the beneficiary, their guardian or Special Trustee as necessary for verification purposes.
Request made by: If the beneficiary is making the request. We ask they still fill out this section of the form. If anyone other than the beneficiary is completing this form. They **MUST** fill out their full name under this section or the request will not be processed.
Phone: If anyone other than the beneficiary is completing this form. They **MUST** fill in their phone number on the request or it will not be processed. **EXCEPTION: The beneficiary does not have to complete this phone number section twice**.
Trust Assistance: If a beneficiary, their guardian or a Special Trustee needs assistance from Life's Plan with a purchase, they must check the box under the Trust Assistance section of this form.
Item/Service Description Section:
Direct Vendor payment (non-reimbursement): A vendor payment should include name of vendor, the amount owed, a copy of the receipt(s)/invoice(s), showing what the purchase is for, a description with the full amount expected for payment from trust account. The trust administrative staff will need the address of the vendor and their phone number for verification purposes as needed and as important delivery and payment arrangements for the beneficiary. .

Reimbursement of purchases made on behalf of a beneficiary- It is not uncommon for a guardian, POA or Special Trustee of a beneficiary to assist the trustee and beneficiary in making particular purchases when the beneficiary has limited access to funds or credit card. A Special Trustee who is authorized to fill out this form on behalf of a beneficiary can seek reimbursement of funds in two ways:
1) They can seek direct repayment from trust for purchases made for the beneficiary, as long as they are not on any means-tested benefits themselves. They must complete the Life's Plan Request for Disbursement Form with all receipt(s)/invoice(s) totaling amount of reimbursement. They can list under one section of the item/services description in summary detail what the reimbursement is for and how many receipts are provided with the request. They must note the total amount seeking for reimbursement. Special Trustee, who is seeking reimbursement, must fill out payee name, address, and phone number.

2) If Special Trustee is seeking reimbursement to their credit card, they are still required to submit the credit card statement along with ALL receipts and invoices that match the expenses line itemed for the beneficiary on the statement.

Requests with need for Trust Assistance: Some of our beneficiaries do not have access to a credit card or reserve funds to make purchases themselves or a personal agent or Special Trustee to assist with making reasonable monthly purchases. Life's Plan Inc. in some cases can assist these clients in making purchases for personal items in providing other supplemental needs with a company credit card or a debit card program for those who qualify. When a client with need(s) for trust assistance is seeking particular purchase request(s), they must fill out the Life's Plan Request for Disbursement Form, noting the particular item or items or services needed with the approximate dollar amount. If it is a particular website, not available on Amazon, the URL webpage on the request form is expected or a name of the link to the website where the trustee can make the purchase. The trustee will need details on requests written under items/service descriptions. The purchase date must also be filled out and the beneficiary and/or their guardian or Special Trustee must check the box in the Trust Assistance section of the request form.

Month-to-Month automated payments: Certain bills, e.g. Comcast or ATT can be set up to be forward mailed to Life's Plan Inc. for payment. The initial set up of these purchases must include a request form. Once the monthly bill is forwarded by mail to Life's Plan. There is no reason for client to submit the request form again. In some cases, certain bills can be arranged monthly to be automatically mailed out to vendor, e.g. Car Insurance. Once an initial request form is submitted for such purchase. There is no requirement to continuing to submit the Life's Plan request form again. The one exception on these is if something changes with the arrangement, e.g. address changes. Then a new Life's Plan Request form must be used to make the necessary delivery changes for that particular bill.

If trustee denies a request, we will contact the requestor to discuss issues and concerns with the request form to assist in making the necessary corrected changes or ask for more documentation as needed.

The best method in making a request to Life's Plan Inc. is going to the Life's Plan Inc. website, www.lifesplaninc.org under our resources page under Request form. The form will be emailed directly to Requests@lifesplaninc.org; Clients can also email a Request form to this address but still must include a request form with receipt(s) and invoice(s). Clients can also mail or fax a Request with Disbursement form at the fax number listed below.

You can also mail in requests as desired, but you must keep in mind five business days does not include mail delivery time.

FAX NUMBERS: 630-628-2350 or 630-628-1488
EMAIL: requests@lifesplaninc.org
ADDRESS: 901 Warrenville Road Suite 500 Lisle, IL 60532