I've been accepted into the Future Care Trust: Getting Started:

How will I know my account has been opened?
The enclosed welcome letter is your confirmation your account is open.

How does Medicaid know I have been accepted into the Future Care Trust?
A copy of the signed Sponsor agreement and proof of deposit into the Trust is enclosed or was previously mailed to the authorized person listed on the Beneficiary Profile. It is your responsibility or that of the identified authorized person to ensure these documents are submitted to the Medicaid office.

How does Future Care receive monthly spenddown deposits?
Monthly spenddown deposits may be mailed to the Future Care Trust office. Spenddown deposits may also be dropped off between the hours of 9AM and 3PM at the Future Care office. For your convenience, there is a security lockbox available for you to safely and securely drop your check into.

When should I plan to pay my monthly Medicaid Spenddown to Future Care Trust?
Monthly Medicaid Spenddown deposits should be submitted on or about the date you receive your monthly Social Security benefit.

Can Future Care Trust accept direct deposits? No
We suggest you set up an Automatic Bill Pay through your checking account. Future Care Community Pooled Trust would be the bill you pay. Provide the bank with the dollar amount of your monthly spenddown. Your bank would automatically send us a check each month according to your specifications.

What types of payment are acceptable? Paper check, money order, or automatic bill pay. The Trust is not able to accept cash payments or electronic transfers.

Who do I make my check or money order out to?
Please make check or money order payable to Future Care Community Pooled Trust and include the following on reference line of check or money order: FBO followed by the Beneficiary's name.

What is the mailing address of the Future Care Trust?

Future Care Planning Services
Trust Dept.
1000 Elmwood Avenue
Rochester, NY 14620

I've made my monthly spenddown deposit. When can I request disbursements be made?

Disbursement requests can be made at any time as long as there are available funds in your account and your account remains in good standing.

When submitting your monthly Spenddown deposit using a personal check, the Future Care Trust holds payments to venders for 3 days to ensure the Spenddown check has cleared the bank and sufficient funds are available.

Who can submit a disbursement request?
The Beneficiary and/or her/his authorized designee can submit a disbursement request. Authorized persons may be changed only by written request of the Sponsor Agreement signer.

What types of expenses can be paid using my Trust account?
Requests for disbursement **must** be for the sole benefit of the Beneficiary

Examples include: Rent, Mortgage, Utilities, car payment, auto repair bill, furniture

The Trustees have absolute discretion to approve or deny requests for payments and the Trustees' decision is binding/final.

What documentation is needed?
In general, Disbursement Request Form and supporting documentation (receipt, price quote, invoice, utility statement etc.) is needed.

Specifically related to the following expenses:
Rent – A current signed lease/landlord agreement indicating the Beneficiary as tenant must be on file. Lease must identify all household members *Note: a lease between spouses will not be honored.*

Homeowner Association Fees – a payment coupon in the name of the Beneficiary must be submitted.

Mortgage – a mortgage document or payment coupon in the name of the Beneficiary.

Credit Card Company- A current credit card statement and receipts documenting/supporting charges on account are for the sole benefit of the beneficiary. The complete detailed statement must be submitted along with itemized receipts for purchase to be paid.

Funeral Expenses: Pre-Need Irrevocable Burial- A copy of the itemized bill.

Can I as the Beneficiary receive funds directly from the Future Care Trust? No

What types of businesses/services does the Future Care Trust send payments?
All Disbursements must be made to third parties.

The Trust does not employ individuals to provide any service to the Beneficiary; therefore, all third party service providers and vendors must be *legitimate registered businesses.*

How are disbursement requests processed?

Disbursement Requests and supporting documentation must be submitted in writing by mail, or fax to FCPS Trust Dept. The documents may also be scanned and emailed. The request must be signed by the Beneficiary or other authorized individual in the Beneficiary profile. Requests for disbursement will be reviewed upon receipt. The Trust book-keeper or designee reviews all received requests and processes accordingly.

When are disbursement requests processed?

Requests are reviewed and processed weekly. Approved requests are disbursed within 8-10 days after receipt. Please plan accordingly; FCPS is not responsible for incurred late charges. Requests other than day to day living expenses may require approval by the Trustee Committee and will require additional time for review, authorization and processing.

Are there time limits for making disbursement requests? Yes

Expenses must be incurred prior to date of death and within 90 days of disbursement request submission.

When using a credit card to pay for items, incurred expenses must be current charges.

How do I obtain Disbursement Request Forms?

To help get you started, two disbursement request forms are included as part of your welcome packet for your convenience. Please make copies of the enclosed forms for future use. The disbursement request forms are also available for download on our website: www.futurecareplaning.org

Can I check my account activity online? No

At this time, the Future Care Trust does not offer this option.

How do I know what funds are available in my account?

Monthly account statements are mailed to either the Beneficiary or the authorized representative listed on the profile. Monthly accounts statements are a good reference and source of information to help track account funds.

Important Numbers to Know:

Future Care Trust contact information:

Mailing Address: *Future Care Planning Services Trust Dept.*
1000 Elmwood Avenue
Rochester, NY 14620

Fax: (585) 210-4048

Trust Bookkeeper: (585) 402-7840 ext. 6

Trust Administrator: (585) 402-7840 ext. 1

www.futurecareplanningservices.org
www.trust@futurecareplanning,org

Rev Date Dec. 30 2013