

MASTER TRUST CHECKLIST

BE SURE TO CONTACT YOUR SUPERVISING ATTORNEY REGARDING ANY MASTER TRUST ISSUE

Master Trust Issues	Action Plan			
	Yes/No	Volunteer	Attorney	Case Coordinator
	<i>Determine who is responsible for each Master Trust Issue - provide completion dates if appropriate</i>			
Has the department provided regular accountings?				
Has the department applied for SSI benefits on behalf of the child?				
Is the child eligible for any derivative benefits (parents deceased or disabled)?				
Is there an appropriate adult who can serve as the representative payee for the child rather than the department?				
Has the department filed the required Master Trust accountings?				
Is there a spending plan in place to ensure that funds are used to meet the child's specific needs?				
If the child receives SSI, is the balance of the Master Trust current needs sub account close to the \$2000 limit?				
How has the department spent the child's money?				
Is the child's specific need being met by the expenditures?				
Are there accurate records?				
Does the child actually have the property purchased with his or her money?				
Has the advocate considered a PASS account, Special Needs Trust or Pooled Trust for the child's Master Trust funds?				

Has the department provided notice of the child's right to request a fee waiver with every judicial review?				
Does the child need a lump sum of money to address a specific need? If so, has a waiver request been filed?				
Does the child have an ongoing need for additional funds to be expended? If so, has a request to increase the personal allowance been filed?				
Is the child close to turning 18? If so, has a motion regarding the disbursement of the funds to the child been filed?				