

TRUST UNITED, INC.
REPRESENTATIVE PAYEE SERVICES AGREEMENT

This Representative Payee Services Agreement ("Agreement") is entered into by and between **Trust United, Inc.** ("Trust United") and the undersigned beneficiary ("Beneficiary").

I. APPOINTMENT OF REPRESENTATIVE PAYEE

I, _____, voluntarily authorize and appoint **Trust United, Inc.** to serve as my Representative Payee upon approval and authorization by the Social Security Administration (SSA) or any other governmental benefits agency authorizing such appointment.

Upon approval, Trust United shall receive my benefit payments and administer those funds in accordance with applicable federal regulations, SSA guidelines, and the fiduciary responsibilities required of a Representative Payee.

II. SERVICES PROVIDED

Trust United agrees to provide the following services:

1. Receive and safeguard benefit payments on behalf of the Beneficiary.
2. Maintain accurate financial records of all income and expenditures.
3. Pay approved living expenses including, but not limited to:
 - o Rent or Room and Board
 - o Utilities
 - o Food and Household Expenses
 - o Medical Expenses
 - o Personal Needs Allowances
 - o Other approved expenses benefiting the Beneficiary
4. Monitor available funds and budget expenditures responsibly.
5. Maintain records necessary for SSA reporting and audits.
6. Provide account statements and expenditure reports as required by law or upon reasonable request.
7. Ensure that all funds are used solely for the benefit of the Beneficiary.

III. SERVICE FEE

The Beneficiary agrees that Trust United may collect the authorized Representative Payee service fee permitted by the Social Security Administration.

The current monthly fee is: **\$57.00 per month** or such other amount as may be authorized or adjusted by SSA regulations.

The Beneficiary understands that Representative Payee fees are regulated by SSA and may change periodically without prior notice.

IV. DISBURSEMENT OF FUNDS

Trust United shall make payments on behalf of the Beneficiary according to available funds and approved budgeting requirements.

The Beneficiary acknowledges:

1. Essential living expenses shall receive priority consideration.
2. Trust United cannot disburse funds that are not available in the Beneficiary's account.
3. Personal spending money shall be provided according to the approved budget and available funds.

4. Emergency requests shall be reviewed on a case-by-case basis.
5. Trust United reserves the right to deny expenditures that:
 - o Violate SSA rules;
 - o Exceed available funds;
 - o Appear fraudulent, unsafe, or not in the Beneficiary's best interest.

V. BENEFICIARY RESPONSIBILITIES

The Beneficiary agrees to:

1. Provide accurate information regarding housing, income, expenses, and financial obligations.
2. Notify Trust United immediately of:
 - o Address changes;
 - o Changes in living arrangements;
 - o Hospitalization;
 - o Employment;
 - o Changes in income;
 - o Marriage, divorce, or legal status changes;
 - o Any event that may affect SSA eligibility or benefits.
3. Submit requests for additional funds in a timely manner.
4. Cooperate with Trust United in maintaining accurate records and budgeting.
5. Use funds received for their intended purpose.

VI. LIMITATION OF LIABILITY

Trust United shall not be liable for:

1. Delays caused by the Social Security Administration, banks, postal services, government agencies, or third-party vendors.
2. Insufficient funds resulting from reduced benefits, overpayments, benefit suspensions, garnishments, or SSA actions.
3. Losses resulting from inaccurate information provided by the Beneficiary or third parties.
4. Decisions made by SSA regarding benefit eligibility or payment amounts.

Trust United shall perform all duties in good faith and in accordance with applicable laws and regulations.

VII. RECORDS AND AUDITS

The Beneficiary acknowledges that:

1. Trust United is required to maintain financial records.
2. Trust United may disclose records to SSA, auditors, governmental agencies, courts, guardians, or other authorized parties as required by law.
3. Financial records remain the property of Trust United and shall be retained in accordance with federal and state record retention requirements.

VIII. TERMINATION OF SERVICES

This Agreement shall terminate upon:

1. Written resignation of Trust United approved by SSA;
2. Appointment of a successor Representative Payee by SSA;
3. Death of the Beneficiary;
4. Restoration of the Beneficiary's ability to manage benefits as determined by SSA;
5. Any lawful termination authorized by SSA regulations.

Termination of this Agreement does not relieve either party of obligations incurred prior to termination.

IX. ACKNOWLEDGMENT

The Beneficiary acknowledges that:

- Representative Payee services are subject to federal laws and SSA regulations.
- Trust United's primary responsibility is to ensure that benefits are used in the Beneficiary's best interest.
- Trust United does not guarantee the availability of funds beyond the amount received from benefit sources.
- The Beneficiary has had the opportunity to ask questions regarding this Agreement and understands its terms.

BENEFICIARY

Name: _____

Signature: _____ Date: _____

TRUST UNITED, INC.

Authorized Representative: _____

Title: _____

Signature: _____ Date: _____

TRUST UNITED, INC.

Enterprise Financial Care Infrastructure

"Protecting Benefits. Preserving Dignity. Promoting Independence."