



BENEFICIARY RESPONSIBILITIES

TRUST UNITED Representative Payee Services

As a beneficiary receiving representative payee services through TRUST UNITED Representative Payee Services, you are expected to cooperate with program requirements established by the Social Security Administration (SSA) and TRUST UNITED policies and procedures.

Beneficiary Responsibilities

- Provide accurate and truthful information regarding financial, medical, and living situations.
- Notify TRUST UNITED immediately of any change in address, residence, hospitalization, incarceration, employment, income, or living arrangements.
- Provide monthly receipts or supporting documentation for approved purchases or spending when requested.
- Participate in budgeting and financial planning activities.
- Maintain communication regarding bills, rent, utilities, medical needs, and emergencies.
- Notify TRUST UNITED immediately of any concerns involving fraud, abuse, neglect, exploitation, or misuse of funds.
- Use personal spending funds responsibly and in accordance with approved budgeting plans.
- Respect TRUST UNITED staff, policies, and operational procedures.
- Inform TRUST UNITED promptly of any notices or correspondence received from the Social Security Administration or other agencies.

Failure to cooperate with representative payee requirements may affect TRUST UNITED's ability to continue services and may require notification to the Social Security Administration.

Acknowledgment

Beneficiary Name: _____

Beneficiary Signature: _____

Authorized Representative (If Applicable):

Date: _____

HOW TO REPORT ABUSE – 1-800-96-ABUSE