

Life Navigators Trust Program Beneficiary Legal Fund Request

Life Navigators Beneficiary Legal Fund is available to cover legal fees for individuals with disabilities to implement a Funded Life Navigators Trust I, II or III. Each Beneficiary can request up to \$2,000. Approved funds can be disbursed directly to the Beneficiary Trust Account or to the Attorney drafting the Funded Trust. Payment will be disbursed once the Trust is approved by the Trustee (Prairie Trust) and the Trust Manager (Life Navigators).

For questions or additional information on the Beneficiary Legal Fund, please contact the Trust Team at (414) 774-6255 or trust@lifenavigators.org.

Date of Request: _____

Beneficiary's Name: _____

Funded Trust Type:

☐ Trust I - Community Trust

☐ Trust II – Pooled Trust

☐ Trust III – 65 and Older

Estimated Funded Trust Amount: \$ _____

(Please Note: The Beneficiary Fund is available for Funded Trusts estimated at a minimum of \$2,000 and maximum of \$100,000)

Attorney/Law Firm: _____

Contact Information: _____

Beneficiary Fund Request Amount (Up to \$2,000): \$ _____

(Please include Attorney invoice or billing with request)

☐ Fund Distribution to Beneficiary Trust Account

☐ Fund Distribution Payment to Attorney/Firm

