

Life Navigators Trust Program is designed to ensure individuals with disabilities of all ages lead safe, happy lives in our community.

**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).

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. The Fund will not provide payment until the beneficiary's trust is funded.)

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.

****If this is your first Beneficiary Legal Fund request, please attach your Firm's W-9.**

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