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# **Welcome Packet**



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## **Welcome!**

Thank you for choosing CPT Institute. We're excited to work with you while we protect your government benefits eligibility. Having helped clients across the nation build and safeguard government benefits, we're ready to walk you through this process confidently.

Enclosed is some essential information about your trust, and what your time with our team will entail. By reading these documents carefully, you will learn how to maximize your experience with the CPT Institute team, how to use your trust and stay updated.

You'll also be learning:

- ✓ **Next steps after you sign your trust document**
- ✓ **How you and CPT Institute will work together to protect your government benefits**
- ✓ **How to contact your CPT Institute Representative**
- ✓ **Our policies, procedures, and recommendations**
- ✓ **Government Agency policies and procedures**
- ✓ **Frequently asked questions such as: What can I purchase with my Trust? How do I purchase Items?**

If this sounds like a lot, don't worry. We'll take you step by step through this process and keep you informed at all times.

You are welcome to reach out to the CPT Institute team with any questions regarding your trust account. We also offer many resources on our website that may provide additional assistance.

Again, thank you for choosing CPT Institute to assist you with your trust. We look forward to working with you.

**Welcome to our CPT Institute family!**



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## CPT General Information Cheat Sheet

### EDUCATION AND RESOURCES AVAILABLE ON OUR WEBSITE

[www.cptinstitute.org](http://www.cptinstitute.org)

### WHEN AND HOW TO GET IN TOUCH WITH CPT INSTITUTE

**877-695-6444**

Each of our CPT Representatives are assigned to clients and have their own direct extension line, please keep your CPT Representative's in your records for quicker and efficient service.

Our Phone Hours are:

#### **PST**

M-TH: 9 AM - 4 PM

**Lunch Closed Lines: M-TH: 12PM-1 PM**

Fridays: 9 AM - 12 PM

#### **EST**

M-TH: 12 PM - 7 PM

**Lunch Closed Lines: M-TH: 3 PM- 4 PM**

Fridays: 12 PM - 3PM

### NEED TO SEND A DISBURSEMENT REQUEST?

#### **Four Ways:**

1. Send an email with a picture or PDF copy of your disbursement form and receipts to [inbox@cpttrust.org](mailto:inbox@cpttrust.org)
2. Download our CPT Trust App on iOS or Android
3. Send us a Fax at 619-431-1997
4. Fill our Electronic Disbursement Request form on our website



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## OFFICE CLOSURE DATES

At CPT Institute, we are closed on all national federal holidays. Here is a general list below. Please note that these dates change yearly so please be sure to check out for upcoming newsletters for updates.

**New Year's Day**  
**Martin Luther King Jr. Birthday**  
**President's Day**  
**Memorial Day**  
**Juneteenth**  
**Independence Day**  
**Labor Day**  
**Veteran's Day**  
**Thanksgiving Day**  
**Day After Thanksgiving (open 9:00 AM – 12:00 PM PST / closed afternoon)**  
**Christmas Eve**  
**Christmas Day**  
**Annual Employee Training (Thursday-Sunday in December)**

## ADDITIONAL INFORMATION

### Newsletters

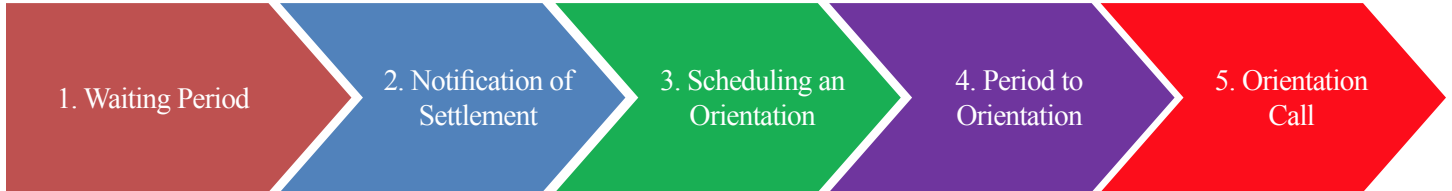
Every month CPT Institute will be sending a Monthly Newsletter (generally the 3rd week) which includes new updates, announcements, and tips and tricks to the main point of contact for your trust account. Please make sure we have your updated email address on file.

### Tax Forms

During the tax season, you will receive a tax document that reports the income earned in the trust. This will be a 1099 form or grantor letter.



## I Signed Trust Documents – What’s Next?



1. Waiting Period

2. Notification of Settlement

3. Scheduling an Orientation

4. Period to Orientation

5. Orientation Call

### Step 1

#### WAITING PERIOD

- Thank you for Signing our Trust Documents; we are excited to serve you and help protect your government benefits.
- At this time, we await the funding in order for your trust account to be officially active.

### Step 2

#### NOTIFICATION OF SETTLEMENT / FUNDS

- Your attorney or individual who is the source of your funds has notified us that we will be receiving your Settlement or funds fairly soon! Hooray!
- If applicable at this time, the defense often has 30 days to issue payment.
- Once the check is received by CPT Institute, it typically takes 3-10 days for the check to clear and be available for use.
- We will notify you via email that your trust has funded and is now active.

**Continued to next page >>**



**Step 3**

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## **SCHEDULING AN ORIENTATION**

- After the bank confirms that your funds have been received, you will be assigned a CPT Representative.
- Your CPT Representative will directly reach out to you to schedule an orientation to discuss the rules and procedures of the trust. Please prepare yourself for questions related to:
  - Monthly and Annual Spending Plan
  - Capital Expenses within 90 days

***If applicable***

- Any Past Debt
  - Pre-paid Funeral Expenses
  - Establishing True Link Card and True Link Card Expectations
  - Hiring Care Givers
- Your CPT Representative will provide you their personal calendar link to schedule time. Please reach out to your CPT Representative if you have any questions or concerns.

**Step 4**

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## **PRIOR TO ORIENTATION**

- Please refer to page (6) the What's Next Checklist to ensure you prepare successfully for your Orientation.

**Step 5**

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## **ORIENTATION CALL**

- Orientations have a duration of 30 minutes with your assigned CPT Representative. Your assigned representative will be your main point of contact moving forward.



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## CPT BACKGROUND / EXPECTATIONS

### VISION

Envisioning a society where the injured and at-risk can live independent lives with self-determination and dignity.

### CORE VALUES

**Integrity:** We take pride in protecting people with honesty and transparency. We hold our team to the highest standards of excellence to provide the best service to the legal community and clients.

**Empowerment:** “Knowledge is power” when advocating for the injured. Our top priority is educating the legal community and the public on how to protect as many people as possible. Our assets are our employees who are trained to bring value to the at-risk.

**Commitment:** Our team is committed to serving our clients to improve their lives by building compassionate relationships and always finding the best solution for our clients.

### AS OUR CLIENT

We want to build a relationship where we can empower and work together to protect your government eligibility. All of our rules and regulations are mandated by rules enforced by the Social Security Administrative Office and the MediCais Office.

#### Communication

- Please refer to the Communication Policy on Page (12) of your Welcome Packet.
- Please sign and acknowledgement your communication expectations.

#### Disbursement Request Processing

- Please refer to the Disbursement Request Policy on Page (18) of your Welcome Packet. Please sign and acknowledgement your disbursement expectations.





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## **CPT REPRESENTATIVE**

Who is my CPT Representative?

- After funding, you will be assigned a CPT Representative.
- This is your main point of contact related to your trust account.
- Your CPT Representative will conduct your 30-minute Orientation Call
- Please reach out to your CPT Representative if you have any questions or concerns regarding your account.

What Can I Expect from My CPT Representative?

- Your CPT Representative will address any general questions on how to work with us.
- We will provide you with the tools you need to submit requests with minimal support from your CPT Representative.
- Your CPT Representative will follow up with you every month within the first 90 days to confirm you are feeling confident submitting Disbursement Request Forms (DRFs).
- Routine Wellness Checks will be conducted.



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## CPT Orientation Reminder

### MY ORIENTATION DETAILS

Date of Meeting: \_\_\_\_\_

Time of Meeting: \_\_\_\_\_

Who am I Meeting: \_\_\_\_\_

### PLEASE FILL OUT DURING ORIENTATION

My CPT Representative is: \_\_\_\_\_

Extension # is: \_\_\_\_\_

Their Calendly is: \_\_\_\_\_

Their Email is: \_\_\_\_\_

### ORIENTATION NOTES:

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## Trust Beneficiary/ Advocate Checklist

### I AM NEW TO CPT. WHAT IS NEXT?

My 90-day mark since my trust funded is on \_\_\_\_\_.

- I have received an email notification that my Trust has been funded and is now Active.
- If applicable, have I completed my True Link Card Agreement and sent it to my Representative.
- I have completed my Spending Plan. I am aware this is important for budgeting and to establish my Investment Portfolio.
- I scheduled my Orientation with my assigned CPT Representative.
- I reviewed Welcome Packet prior to my Orientation.
- I watched all the Beneficiary videos prior to my Orientation.
- I finished my Orientation with my assigned CPT Representative.
  - I have obtained my CPT Representative's contact information
  - I have confirmed my contact information is up to date
  - My CPT Representative has answered all of my initial questions
  - I have a basic understanding of how my trust operates
- I completed my 90 Day Feedback Survey.

### ANNUAL CHECKLIST

- Have I received my annual disbursement history statement?
- Have I obtained my 1099 or Grantor Letter from CPT?
- Have I conducted my Annual Wellness Check with my CPT Representative?



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## **Trust Beneficiary Communication Policy Agreement**

### **PURPOSE**

This policy explains communication between CPT Institute and the Trust Beneficiary.

Our purpose is to provide the best possible client service to our Trust Beneficiaries and Trust Beneficiary Advocates. CPT's goal is to communicate with you within a timely manner. In order to do so, we use the following methods to communicate directly with you: telephone, voicemail, mail, fax, email, and text messages. Please communicate to CPT the most efficient way to communicate with you regularly. We are committed to work with you. All communication will always be held in confidence between you and CPT Institute.

### **CHANGES TO CONTACT INFORMATION**

As a Trust Beneficiary, it is your responsibility to contact your CPT Representative in a timely manner of any changes to your contact information. Failure to do so could delay constant communication and any submitted disbursement request.

### **METHODS OF COMMUNICATION**

#### **1. Phone Calls**

We would love to be available to personally receive every beneficiary's call but often a CPT Representative's day is scheduled ahead of time with other client meetings to provide the best service to all. Your call is important to us and we will do our best to answer all calls on the same day.

Each of our CPT Representatives are assigned to clients and have their own direct extension line. Please keep your CPT Representative's in your records for quicker and efficient service.

Our Phone Hours are:

Hours: M-TH: 9 AM – 4 PM PST

**Lunch: M-TH: 12PM – 1 PM PST (offline)**

Fridays: 9 AM – 12 PM PST

Call Turn Around

Please only call once and leave a voicemail. Please leave your name, number, a brief message, and a great time to call you back. All voicemails are queued and returned within one business day. The more you call, the slower the processing will take.

#### **2. Booking a Meeting**

Booking a meeting with your CPT Representative will block undivided time and attention to address your questions. Please ask your CPT Representative for their own personal calendar link.



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### **3. Email**

This is the most convenient method of communication. Please allow one business day to receive a response via email. Discuss with your CPT Representative the best way to email us efficiently.

If you are submitting disbursement requests via email, please email [inbox@cpttrust.org](mailto:inbox@cpttrust.org).

Every month CPT Institute emails Monthly Email Newsletters which includes updates, news, and new procedures.

### **4. Fax**

Please make sure your cover sheet includes your CPT Representative's name.

Our fax number is: 619.431.1997.

### **5. Mail**

Mail is a much longer communication process based on mailing times. When submitting a request via mail please ensure all your receipts are attached with a disbursement request form. In addition, we strongly recommend you make a copy of the receipts you are mailing just in case the mailing service misplaces your mail.

### **6. Text Message**

Should you elect to have a text message notification, please let your CPT Representative know. Please note that this is ONLY a notification, at this moment this option does not permit back and forth conversation with your CPT Representative.

## **COMMUNICATION WITH YOU**

If we need your attention, we will first call you and follow up with an email or regular mail.

## **URGENT COMMUNICATION**

If a matter is urgent, please call your CPT Representative directly. Please perform the same actions in the phone calls referenced above.



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## **ABUSIVE LANGUAGE**

We understand that sometimes delays can be very frustrating. Our CPT Representatives are working diligently to address all beneficiaries' questions. We continuously train our CPT Representatives on communication skills. Each are well equipped unless otherwise communicated to make determinations. Mutual respect is the utmost importance.

If an impairment makes it more difficult to comprehend information, please let our staff know so we can find alternative methods of sharing information with you. Please keep in mind, we cannot subject our staff to repeated abuse regardless of the cause. If your CPT Representative feels abused, here is our process for remedying it:

1. Empathetic warning on-phone, followed by ending the call if abuse continues.
2. Written notification detailing potential consequence if abuse continues .
3. Suspension from verbal communication for 90 days (or longer if it's a repeated offense). Email or regular mail communicated will be enforced.
4. Forgiveness meeting: Designed to teach empathy to both sides and reestablish trust expectations.

DISCLAIMER: CPT Institute reserves the right to modify this Policy at any time without notice.



## **How can you use the funds in your trust?**

Here is a guide to some of the areas where you can use your trust funds.

### **SUPPLEMENTAL MEDICAL AND MEDICAL-RELATED NEEDS**

- Medications
- Non-necessary medical care, services, and procedures
- Special dietary supplements
- Special equipment and clothing
- Supplemental nursing care
- Rehabilitative and physical therapy
- Wheelchair, electric scooter, and/or other mobility aiding equipment
- Medical implants, artificial limbs, and orthotics, and other similar items
- Mechanical, electric, or other special beds
- Psychological services
- Dental, ophthalmic or auditory care
- Home improvements to make the living environment more accessible
- Cosmetic surgeries
- Experimental treatments
- Alternative medical treatments and medications
- Similar care which public assistance programs may not otherwise provide, including payments to those providing services in the home or other locations

### **GENERAL NEEDS**

- Payments to caregivers
- Attorney, Care Manager, and Guardian services and fees
- Motor Vehicles
- Clothing
- Entertainment
- Electronics, including
  - Phones
  - Television
  - Cable
  - Internet
  - Satellite
  - Wireless services
- Visitation or vacation-related expenses
- Recreational activities
- Hair, nail, and other personal care
- Stamps, writing materials, and packaging materials
- Special sports and social memberships
- Prepaid burial space
- Insurance premiums on personal property



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## Frequently Asked Questions

Here are some answers to commonly asked questions. For additional Frequently Asked Questions, please refer to our link on our website: <https://www.cptinstitute.org/faqs/>. Please consult CPT Institute about your specific situation, as each person's needs - and Trusts - are unique. Our goals are to protect your benefits and ensure that we help you follow all applicable laws.

### **Q: What is Fiduciary Duty, and why is it the most common reason for a request to be denied?**

A: The fiduciary duty is the highest legal obligation you can owe another under the United States law. In short, it means that the disbursement made by the Trustee must be in the Trust Beneficiary's best interest. For example, when purchasing a home, we have to ensure that you have the necessary resources to maintain that home (i.e., routine maintenance, taxes, insurance, etc.) before releasing the funds.

### **Q: Can I purchase a house or car?**

A: Yes, all Trust Beneficiaries are allowed at least one vehicle and one home in their name. There are often a few extra pieces of documentation required for large purchases. Still, as a flat-rate Nonprofit Trustee, CPT Institute does NOT limit your spending based on a max amount of your trust corpus (i.e., principal reduction rules). The biggest issue when approving a large purchase is ensuring fiduciary duty is met (i.e., it is reasonable and in your best interest long-term).

### **Q: Can the trust pay for food, rent, mortgage, or other shelter expenses?**

A: Food and shelter expenses can be paid; however, they may result in a reduction or loss of benefits if you receive Supplemental Security Income. Please speak to your CPT Representative to learn more.

### **Q: Can the trust pay off my credit card debt?**

A; Yes, as long as you can produce the last 12 months' worth of statements and request this within 90 days of your trust becoming established.

### **Q: Can the trust pay back family members for money or time they provided while waiting for my settlement?**

A: Please discuss this with your CPT Representative right away. The biggest hurdle is that you'll need proper documentation to substantiate the amount loaned. In short, you may need to complete this outside of the trust if you cannot produce appropriate documentation.





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**Q: Can the trust pay individuals to provide care to me as the trust beneficiary?**

A: Yes, but there are restrictions. For example, the caretaker must be on payroll with proper insurance to ensure all parties are protected. State employment rules apply.

**Q: Can the trust pay for my vacation?**

A: Yes, the trust can pay a beneficiary's expenses to take a vacation. The trust can pay for airfare, hotel, food, souvenirs, rental car, and other transportation.

Do you have other questions? Please feel free to set up a free consultation with CPT Institute.



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## **DISBURSEMENT REQUEST POLICY**

### **PURPOSE**

This policy explains the expectations and procedures of completing a disbursement request.

### **WHAT IS A DISBURSEMENT REQUEST?**

It is a request to pay for purchases and bills with trust funds.

Our goal at CPT is to provide the best customer service and convenient systems to make it easier for our Trust Beneficiaries and Advocates to submit Disbursement Requests.

### **WHY A DISBURSEMENT REQUEST?**

The purpose of a Special Needs Trust is to enhance the quality of life of the Trust Beneficiary. Trust funds are to be used to cover expenses above what is provided for by your government benefits (SSI, SSDI, & Medicaid). All of our rules and regulations are mandated by laws enforced by Social Security Administrative Office and the Department of Healthcare Services to ensure compliance at all times.

Please reach out to your assigned CPT Representative for additional questions or assistance to find the most efficient solution of submitting a disbursement request.

### **EXPECTATIONS**

- Purchases must be for the Direct Benefit of the Trust Beneficiary
- Please cooperate with any questions your assigned CPT Representative would like to ask regarding your request.

### **WHO CAN I SEND PAYMENT TO:**

- Requests for disbursements must request that payment be made to third parties. This may include vendors, service providers, or individuals who have purchased items/services on behalf of the trust beneficiary.
  - Under no circumstance can funds be disbursed directly to the beneficiary this will be detrimental to a Trust Beneficiary's government benefits.



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## WHERE DO I SEND A DISBURSEMENT REQUEST?

1. Send an Email: [inbox@cpttrust.org](mailto:inbox@cpttrust.org)
2. Download our CPT Trust App
3. Send a Fax: **619.431.1997**
4. Electronic Disbursement Request Form on the CPT Institute website

## WHEN WILL MY DISBURSEMENT REQUEST BE REIMBURSED?

- Processing time is normally about 3-5 business days if requests are submitted properly.
- 1-2 business days to process a request.
- 1 business day to review/approve a request.
- The next business day the check is sent in the mail.
- There's an expedited fee of \$35.00 applied if you select that option. **This will speed up mailing time but not processing time.**
- Large expenditures such as cars, homes, etc. will require more processing/review time to approve.
- You will receive a notification via email or text message (based on your preference) regarding the final decision on your request.

## HOW DO I SUBMIT A DISBURSEMENT REQUEST?

Please refer to page (21) Disbursement Request Checklist and page (18) Disbursement Request Procedures of your welcome packet for additional information.

### *THE FOLLOWING CONDITIONS MUST BE INCLUDED TO SUCCESSFULLY SEND A DISBURSEMENT REQUEST:*

- A Disbursement Request Form for every request must be submitted
  - Forms that are incomplete or unclear will not be processed and may be returned to the beneficiary.
- All requests must be verified by an invoice, bill of sale, credit card statement, or receipt and attached to the form. These must be accurate and true documentation. There are **NO EXCEPTIONS**.
  - If receipts are missing or look suspicious, it may delay the approval of your request.
- Submit the Receipt Tracking Log to list all of your expenses and receipts. This tool will help with faster processing.
- Requests for rent, vehicles, pre-arranged burials, houses, and vacations has an additional required document(s) needed to complete the approval of your request. Please reach out to your assigned CPT Representative for additional details and allow more time for processing

*Please note we require, title of ownership documentation even for rent and insurance disbursements*



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## **DOES CPT DO ONLINE ORDERING?**

Online Ordering is a service we offer, but there is an additional fee. The fee is \$75 charged at an hourly rate. With detailed information we can place an online order and have the items shipped directly to the trust beneficiary. Orders must be more than \$500.00 at a time.

DISCLAIMER: CPT Institute reserves the right to modify this Policy at any time without notice.



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## Disbursement Request Checklist

- I completed my Disbursement Request Form
  - Every field is completed
  - I double checked the Payee and their address
  - I double checked the Grand Total
  - I have Signed and dated the Disbursement Request Form
  
- I have thoroughly completed my Receipt Tracking Log
  
- I have included the followings that are required:
  - All receipts & invoices
  - Credit Card Statement

*All True Link Card reload require all receipts and invoices. Please use the Receipt Tracking log as a organizational tool*
  
- I have included the followings that are applicable:
  - My Title of Ownership is on file with CPT to process
  - Pictures of Purchased Items (Home Renovations)

DISCLAIMER: Incomplete documentation will be withdrawn and must be resubmitted. This will delay the processing time.



## Disbursement Request Form Explainer

<b>Which government benefits do you have? (i.e., Medicaid, SSI, etc.)</b>	<b>Enter the name of the beneficiary.</b>	<b>Enter the Trust ID number.</b>	<b>Enter the beneficiary's phone number.</b>
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**SPECIAL NEEDS TRUST DISBURSEMENT REQUEST FORM**  
 Phone: (877) 695-6444 | Email: [inbox@cpttrust.org](mailto:inbox@cpttrust.org) | Fax: (619) 431-1997 | [www.cptinstitute.org](http://www.cptinstitute.org)

Trust Beneficiary Name:		Trust ID:
Government Benefits:	Phone Number:	
Advocate Name (if applicable):	Email:	
Address:		

<b>What is name of the Advocate (if any).</b>	<b>Enter the Advocates mailing address. If you do not have an advocate, please enter your mailing address.</b>	<b>Enter the Advocates email. If you do not have an advocate, please enter your email address.</b>
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Who is the money going to?

How much is being requested out of your trust account?

**DISBURSEMENT MUST BE PAYABLE TO A THIRD PARTY AND FOR THE BENEFIT OF THE BENEFICIARY**

PAYEE (who the check is going to/name of payee receiving the check)	AMOUNT
	\$
<b>DESCRIPTION</b> (a brief description of your request)	
<b>CHECK MEMO LINE</b> (account number, check description, etc.)	

CHECK DESTINATION ADDRESS		
<input type="checkbox"/> Directly to Payee address (specify below)	<input type="checkbox"/> Advocate	<input type="checkbox"/> Trust Beneficiary
Street:		
City:	State:	Zip:

Where should the check go?

Enter the street address, city, state, and zip code of person receiving the money.

What is the money for?



Would you like the money express mailed?

EXPEDITED MAIL REQUEST (optional)

The fee for this service is \$35.00. This only expedites the mail time for this disbursement request, not the normal processing time required by CPT Institute.

DISBURSEMENT TYPE (choose one)

DIRECT PAYMENT

Direct payment to a third-party vendor. Example: Furniture store, cell phone company, internet company, etc.

TRUE LINK CARD

Reloading funds on your True Link Card.

REIMBURSEMENT

Payment to a third-aprty individual. Example: Friends/family member purchased something for you.

CREDIT CARD

Direct payments to a credit card company. Example: Credit Card and you would like to pay for it.

RECEIPT TRACKING REQUIREMENT

Submitting multiple receipts, please be sure to use the attached Receipt Tracking Log.

If you are requesting to reload funds on your True Link Card or pay your credit card, please do the following:

- Enter all transactions listed on the credit card statement/True Link Card Activity Report that you would like to be counted.
- If you do not have the receipt, please enter a "0" in the Amount to pay colum.
- If you are not requesting full payment on a receipt, please enter the amount requested in the Amount to pay column and make a notation on the receipt.

What type of payment is this?





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I hereby authorize the trustee to make payments to the payee/creditor in the amount indicated. I understand if this disbursement compromises government benefits eligibility it may be denied or may cause a reduction in benefits. If denied and payment is still requested the program's Administrator, Trustee, and Non-Profit shall not be held liable for any loss of benefits and will hold the aforesaid harmless from any claims or liability.

BENEFICIARY / ADVOCATE SIGNATURE	PRINT NAME	DATE
		

Phone: (877) 695-6444 | Email: [inbox@cpttrust.org](mailto:inbox@cpttrust.org) | Fax: (619) 431-1997 | [www.cptinstitute.org](http://www.cptinstitute.org)

Sign here.

Print your name.

Enter the date.



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**Fill out this form when submitting receipts.**

**RECEIPT TRACKING LOG**

Required when submitting multiple receipts

Submitting multiple receipts, please be sure to use the attached Receipt Tracking Log.

**If you are requesting to reload funds on your True Link Card or pay your credit card, please do the following:**

- Enter all transactions listed on the credit card statement/True Link Card Activity Report that you would like to be counted.
- If you do not have the receipt, please enter a "0" in the Amount to pay column.
- If you are not requesting full payment on a receipt, please enter the amount requested in the Amount to pay column and make a notation on the receipt.

**CREDIT CARD / TRUE LINK CARD**

Receipt #	Store Name	Description	Amount to Pay	Running Balance

Enter receipt number.

Enter store name.

Enter a description of the items purchased.

Enter the amount of each receipt.

Add each receipt amount to have a running total.



Receipt #	Store Name	Description	Amount to Pay	Running Balance
<b>Total Requested:</b> This amount should match the amount on the Disbursement Request Form			\$	

Calculate total amount of all receipts.

Page \_\_\_\_ of \_\_\_\_

Mark all page numbers if more than one page of receipts.