

Uvalde Together We Rise Fund

3 things to do before you start your Category C or D application

1. Decide where the money will be deposited

- A. **If the person receiving the money is an adult** (such as a teacher who was present in the West wing or on the playground) there is absolutely no restriction on where the funds go or how they are used. However, if you receive public benefits, please see the section below to consider the impact. We **recommend** that you work with a certified financial planner so the money can do whatever you want it to do.
- B. **If the person receiving the money is under the age of 18 and is receiving the money under an application in Category C or D** (such as a child who was present in the West wing or on the playground) the money must be paid to a third-party managed trust to ensure that the funds are safeguarded and used for the health, education, welfare and support of the child while the child is growing up. Once the child reaches the age of 21 they will have the money free and clear and can use it as they wish.

The Parent or Guardian will get to choose:

- Where they want the trust to be held
- Whether they want the trust to be a bank account or an investment account
- Who they want the trustee to be

You must have the Trust established **before** you submit your application so that you can include the appropriate payment information in your application. Creating a Third-Party trust will require you to get a separate taxpayer identification number (TIN) for the trust. You can obtain a TIN online at <https://www.irs.gov/individuals/international-taxpayers/taxpayer-identification-numbers-tin>

These local institutions are available to assist you with opening a Third-party managed trust:

- **Edward Jones Investment Services** (investment account)
200 E. Nopal, Suite 205
Uvalde, TX 78801
Contact: Aaron Pulsford
830 278-7138
aaron.pulsford@edwardjones.com
- **Raymond James Financial Services, Inc.** (investment account)
Member FINRA/SIPC
426 E. Nopal
Uvalde, Texas 78801
830-278-4555
Contact: Tina Scott

2. Consider your Public Benefits

Do you receive any of the following public benefits?

- Public Assistance/Cash Assistance/TANF
- SNAP/Food Stamps
- Medicaid/MAGI
- SSI/Disability
- SSD/Disability
- Veterans Benefits
- Rental Assistance/Shelter
- Section 8/Belmont/Housing Choice Voucher/RAC/BMHA
- Public Housing/BMHA/HUD/rapid rehousing/SPOA
- Medicare/Medicare Part D
- Children's Health Insurance Program/CHIP

If you answer "yes" to any of the above, when the government learns about the gift you receive from us, it could possibly impact your ability to continue to receive these public benefits. Receiving public benefits will not have any impact whatsoever on the size of the gift that you receive from the fund. We also want to ensure that any gift you receive from the fund does not jeopardize your public benefits. If you receive public benefits, you will be referred to a pro bono (free) attorney who will look at your specific situation and benefits and offer you legal advice on what you can do to protect your public benefits.

The attorney may advise you that the gift you receive will have no impact on your benefits. Or the attorney may recommend the creation of a "special needs trust" so your gift does not disqualify you from any of your public benefits. It is always **your choice** how to proceed, but we want you to make an informed choice as to what option is best for you so you do not have any unexpected consequences. If you choose to create a "special needs trust" and the victim is a minor for whom you are required to create a Third-party trust, **it can be the same trust**. So, if you have public benefits and a minor is receiving the money, you should get legal advice on your benefits **before** you create a trust.

To be referred to a free attorney for advice on protecting your public benefits, contact:

- Bernadette Segura at 915-585-5100 x 5133; OR
Brittanny Perrigue Gomez at 361-880-5460
Texas Rio Grande Legal Aid

3. Complete your other required documents

If you experienced Psychological Trauma and are applying under Category C or D the applicant must include a sworn affidavit which is signed and notarized. There is one affidavit for eligible adults applying for themselves. There is a different affidavit for parents applying on behalf of their children. Both versions of the affidavit are attached.

