

Uvalde Together We Rise Fund

3 things to do before you start your Category E application

1. Decide where the money will be deposited

- A. **If the person receiving the money is an adult** 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 money under Category E** (they were present somewhere on campus other than the West Wing or the playground) the money, by law, must be paid into a Uniform Transfers to Minors Act (UTMA) account, where a parent or guardian serves as custodian of the funds until the child reaches the age of 18.

The Parent or Guardian will get to choose:

- Where they want to open the UTMA account
- Whether they want the UTMA account to be a bank account or investment account
- How to use the funds for the child benefit until the child reaches age 18

You must have the UTMA account opened **before** you submit your application so that you can include the appropriate payment information in your application. These local institutions are available to assist you with opening an UTMA account:

- **First State Bank of Uvalde** (Savings Account)
200 East Nopal Street
Uvalde, TX 78801
Contact: Cody Smith, Senior Vice President
830-278-6231
csmith@fsbuvalde.com

- **Security Service Federal Credit Union** (Savings Account)
605 E. Main Street
Uvalde, TX 78801
Contact: Debra Quijano, Branch Manager
dquijano@ssfcu.org
Contact: Annette Oakley, Assistant Branch Manager
830 278-4804
Members can walk in or an appointment an appointment can be set up ahead of time at
<http://www.ssfcu.org>.

- **TXN Bank** (Savings Account)
727 E. Main Street
Uvalde, TX 78801
Contact: Linda Elledge or Lott Whitwell
830-278-8765
lwhitwell@txn.bank
- **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:

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

3. Complete your other required documents

If you experienced Psychological Trauma and are applying under Category E, 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.

If opening a UTMA custodial account for a minor, the Custodian must complete, sign and have notarized, the Texas UTMA Custodian Certification which must be submitted with the application. A copy of this form is attached.

PLEASE NOTE: THE AFFIANT IS THE PARENT OR GUARDIAN OF A MINOR CHILD WHO WAS PRESENT AT THE SCHOOL. THIS MUST BE SIGNED BY AN ADULT OVER THE AGE OF 18, IN THE PRESENCE OF A NOTARY.

AFFIDAVIT ON BEHALF OF MINOR CHILD

STATE OF _____ [state where signed])
)
COUNTY OF _____ [county where signed])

NOW COMES the Affiant, _____ [name], being first duly sworn under oath, and states as follows:

1. I am _____ [name].
2. I am the Parent or Legal Guardian of _____ [child's name], who was present at Robb Elementary School at 11:27 am on May 24, 2022.
3. I request benefits from the Uvalde Together We Rise Fund on behalf of my minor child.
4. My child meets the eligibility standards set forth in the Final Protocol. After the shooting, my child experienced psychological trauma.
5. I completed all other requirements of the Application and all the information I provided is true and accurate under penalty of perjury.

FURTHER AFFIANT SAYETH NAUGHT.

[Signature of Affiant]
Note: This must be signed in the presence of the Notary. Do not sign until instructed to do so by Notary.

Sworn and subscribed before me this ____ day of _____ [month], 20__ [year]

Notary Public

My Commission Expires: _____



Jeffrey R. Dion
Executive Director

Board of Directors
Marc C. Lenahan, Chairman
Bethzaida Garcia
Philip Gerson
Keith Franz

TRANSFER UNDER THE TEXAS UNIFORM TRANSFERS TO MINORS ACT

I, Jeffrey R. Dion, as Executive Director of the National Compassion Fund, transfer to

_____ (name of parent/custodian), as custodian for _____

(name of minor) under the Texas Uniform Transfers to Minors Act, the following:

A CHARITABLE GIFT from the National Compassion Fund in the amount determined by the Local Steering Committee for validated applicants in Category E, in recognition of the psychological trauma experienced by the minor as a result of the May 24, 2022, shooting at Robb Elementary School.

September 6, 2022

_____ (name of custodian) is prepared to receive the funds described above as custodian for the minor named above under the Texas Uniform Transfers to Minors Act, Chapter 140, Texas Property Code (the "Act") and assumes the duties set forth in the Act .The custodian shall observe the standard of care that would be observed by a prudent person dealing with property of another. The custodian at all times shall keep custodial property separate and distinct from all other property in a manner sufficient to identify it clearly as custodial property of the minor. The custodian shall keep records of all transactions with respect to custodial property, including information necessary for the preparation of the minor's tax returns. The custodian may deliver or pay to the minor or expend for the minor's benefit as much of the custodial property as the custodian considers advisable for the use and benefit of the minor.

Dated: _____

Signature of Custodian

Sworn and subscribed before me this ___ day of _____ [month], 20__ [year]

Notary Public

My Commission Expires: _____

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