

Love for Louisville Old National Bank Fund

3 things to do before you start your Category D application

1. Decide how you want to be paid

- A. There is absolutely no restriction on where the funds go or how they are used. You can be paid by check or Zelle. Our preferred method of payment is Zelle, which will directly deposit funds into your account and does not require us to have your account information. If you use Zelle, ask your bank if they place any limit on incoming Zelle transfers.
- B. 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.

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 Housing
- Public Housing/BMHA/HUD/rapid rehousing/SPOA
- Medicare/Medicare Part D

If you answer “yes” to any of the above, when the government learns about the gift you receive, 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 directed to speak with an 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 we are paying to a trust or a minor custodial account, we must issue that individual payment by check.

3. Complete your other required documents

- A. If you experienced Psychological Trauma and are applying under Category D**, the applicant must include a sworn affidavit which is signed and notarized. The affidavit form is attached.
- B. Have a photo of the front and back of your government-issued photo identification**

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: _____