



Disbursement Release

Many government programs that provide you with monthly income or payments for medical services have strict financial eligibility limits. Without careful planning, your settlement award may cause you to lose your eligibility for those programs. It is important that you know what, if any, government benefits you are receiving now, or could receive in the future.

Plans that may be interrupted as a result of your settlement include:

Supplemental Security Income And Medicaid

Supplemental Security Income (“SSI”) and Medicaid are *needs-based programs* (also called “poverty programs”). In most states, disabled people who qualify for SSI, automatically become eligible for Medicaid, which is the federal / state program for medical-care coverage for the needy. Medicaid benefits can cover items like prescription medication, transportation, and home-based care. Because these programs are needs-based programs, your award may affect these benefits. For example, a person with assets of approximately \$2,000.00 may not be eligible for SSI and/or Medicaid in most states, depending on the circumstances.

Subsidized housing and food stamps are also needs-based programs affected by your award.

You have been informed that if you currently receive (or are eligible to receive) government benefits like SSI, Medicaid, food stamps or subsidized housing you should explore your options to preserve those benefits before you receive a settlement funds or your options to do so might be compromised. You were given instructions to follow concerning the above topics prior to accepting your net settlement funds.

Your settlement is in the process of being funded. To allow release of your award, please sign and return this document acknowledging your informed decision.

Stephens & Stephens does not represent you for taxation or financial planning purposes and does not provide any advice to you concerning those topics.

_____ Please hold my award so I may attempt to arrange a Special Needs Trust d4(a) or Pooled Trust d4(c), or engage in exemption planning to preserve my benefits.

_____ I would like to have my award sent directly to me understanding that it may disrupt any needs based benefits for which I may be entitled.

Signature _____ Date _____