



BUDGET: Estimated Expenses to be Paid for Using the Trust

A budget will help in making decisions about how to use funds from the special needs trust. The estimated costs for the year should be based on how long you anticipate the trust lasting.

IMPORTANT: Shelter, utility and food expenses should only be included if benefits allow payment.

Name of Beneficiary: _____ CCT Account #: _____

Name of Advocate: _____

Item(s)/Service(s)	Estimated Yearly Cost
Rent/Mortgage	\$
Food	\$
Utilities	\$
Clothing & Shoes	\$
Household Items	\$
Insurance	\$
Education	\$
Personal Items	\$
Entertainment	\$
Healthcare	\$
Transportation/Vehicle	\$
Phone/Internet/Cable	\$
TV/Electronics	\$
Emergency Fund	\$
Other, please specify: _____	\$
Other, please specify: _____	\$
Other, please specify: _____	\$
	\$ Yearly Estimated Costs
	x Times the number of years you plan for the trust to last
	\$ Total

Note: Please include additional pages if needed