

Trust Management Services

P.O. 3739

Paso Robles, CA 93447

Resources: Burial Account

Persons Served: _____ Social Security Number: _____

Where: _____

Amount/Balance \$ _____ Revocable / Irrevocable (circle one)

Address: _____

City: _____ State: _____ Zip: _____

Phone: (_____) _____ - _____

Service Coordinator: _____ Phone: (_____) _____ - _____

Please attach copy of Burial Document

Trust Management Services

RE: Burial Accounts

All individuals receiving Supplemental Security Income (SSI) can set aside up to \$1,500.00 for the purpose of their burial. Burial funds will be placed in a separate burial account and will not count as a resource. Once funds have been placed in a burial account they can only be used for the purpose of the individual's burial. The funds can be withdrawn once the individual passes away or to purchase a burial contract. If a burial contract is purchased, Trust Management Services must receive a copy of the contract and report the purchase to Social Security.

To open a burial account the person served needs to sign the attached SSA 4169 form and return it to TMS along with a Disbursement Request.