



# Pooled Special Needs Trust GIFT CARD PROCEDURE

Effective July 2015

Listed below are the steps for obtaining a gift card:

1. **Determine that the store you would like to shop at offers gift cards via the internet.** (If the store does not offer gift cards via the internet, Securet cannot order a gift card for that store.) [We are unable to purchase gift cards to stores that sell food item, such as Wal-Mart, Kmart and Target \(SSI recipients only\).](#) An example of cards that are available Sears, Macy's, JC Penney's., Best Buy,
2. **Complete the Request for Distribution of Funds Form.** Write "Gift Card" and the name of the store on your Request Form. Complete the dollar amount up to a \$500 max. Leave vendor address, city, and phone sections blank.
3. **Mail , fax, or email in your request.** Gift cards generally take 2 weeks to process from the date the request is received. Once the card is received you will receive a phone call to notify you that the gift card has been received by Securet and is ready for delivery. There is no need to call the office, unless it has exceeded 2 weeks since your request was placed (not including mail transit). Securet will FedEx or email (by request) your gift card to you (a \$15 Securet fee plus FedEx charges apply and will be deducted from your Trust account).

[Disclaimer: Securet is not responsible for gift cards information stolen if sent via email.](#)

#### 4. Gift Card Rules:

- A. Only one card can be ordered at a time. If you would like an additional gift card you can place another order once the original gift card receipts have been received in good order.
- B. To ensure you are in compliance with the Social Security regulations, do not use the gift card to purchase other gift cards, food and drink or give it as a gift.



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#### 4. **Gift Card Rules (continued):**

C. You must supply Securet with itemized receipts within 2 weeks of receiving your card. Receipts must be received in order to obtain any additional payments from your trust. Receipts can be returned by mail, fax or email. If receipts are not returned within 2 weeks we will not be able to issue you gift cards in the future. If you are having trouble using the gift card within the 2 week timeframe please notify the office and other arrangements can be made at that time.

D. The full value of the gift card must be utilized. Do not return unused gift card.

#### 5. **\$25 Gift Card Fee** (per card) - this fee will be deducted from your Trust account.