

THE DISABILITY FOUNDATION INC.

2014 FLEXIBLE-SPENDING TRUST

THE OHIO COMMUNITY POOLED TRUST

REQUEST FOR DISTRIBUTION – To be typed or printed

“OPT OUT” OPTION: *I would like to opt out of receiving mailed distribution forms, and prefer to access a blank form provided on The Disability Foundation’s website:* Yes No

Fund Recipient’s Name: _____
Address: _____
Phone Number: _____

Personal Representative’s Name: _____
Address: _____
Phone Number: _____
Email Address: _____

Have the fund recipient’s public benefits changed since the last Request for Distribution form was submitted? If so, how? _____

Total amount now available for distribution: _____

To whom should check(s) be made payable? If more than one check is required, please specify each payee, and the amount(s) to be distributed. Note: each must be listed separately, but only one check will be issued to each payee. **If no funds are needed, please write “NO FUNDS NEEDED” on the form, and return the form to our office.**

Payee (make check payable to)	Purpose	Check Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
	TOTAL REQUESTED	_____

If more space is needed, please attach additional sheets.

Date: _____
Signature of personal representative _____

MAILING INSTRUCTIONS: Please indicate where you wish the check(s) to be mailed and provide the recipient(s) address.

GENERAL INSTRUCTIONS:

If possible, please submit a purchase order or other written estimate or bill from the vendor from whom goods or services will be (or have been) purchased.

NOTE: Please provide the Distribution Committee with receipts for all expenditures.

Send Request for Distribution and copies of receipt documentation to: Amie Violette, The Disability Foundation, 1401 S. Main St., Ste. 100, Dayton, OH 45409. For questions, call Amie Violette at (937) 225-9927. Email: aviolette@daytonfoundation.org Fax: (937) 222-0636.