



**Schedule A**  
**Amount to be funded into the Beneficiary's sub-account**

Amount: \$ \_\_\_\_\_

Source of funds:  Settlement  Excess Social Security  Inheritance

Other \_\_\_\_\_

**Schedule B**  
**Remainder Designation**

\_\_\_\_\_ **Retained By Trust.** If money is left in the sub-account when the Beneficiary passes away then the funds shall be retained by the Trust to help the Springhill Housing Corporation with its important non-profit mission of serving individuals with disabilities.

\_\_\_\_\_ **State Payback Option.** If money is left in the sub-account when the Beneficiary passes away and the amount meets the requirements outlined in Article Eight of the Springhill First-Party Pooled Trust, then I want the money to be distributed as follows:

Beneficiary \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Distribute funds outright, free of trust  Maintain a sub-account with a third-party pooled trust

Beneficiary \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Distribute funds outright, free of trust  Maintain a sub-account with a third-party pooled trust

Beneficiary \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Distribute funds outright, free of trust  Maintain a sub-account with a third-party pooled trust

Beneficiary \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Distribute funds outright, free of trust  Maintain a sub-account with a third-party pooled trust

**\*Total percentage must equal 100%**

**Schedule C**  
**Trustee Fees**

There is a one-time enrollment fee of \$500.00, which will be deducted from the initial deposit. There is a fee of \$80.00 per hour for Trust Coordinator and Accounting Department time which will be billed in .25 hour increments. An annual administrative fee of 1% will be charged to all funded subaccounts.

You may also be charged for extraordinary administrative services, expenses, or if an attorney or other staff needs to be consulted regarding your trust sub-account. Time will be billed at the current market rate in .25 hour increments.