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DEBIT

ANDREA DAVIS

VISA

A powerful tool for SNT trustees.

The True Link Visa[®] Protection Card gives trustees of a special needs trust the ability to give beneficiaries more independence while maintaining the control over disbursements required to protect government benefits eligibility.

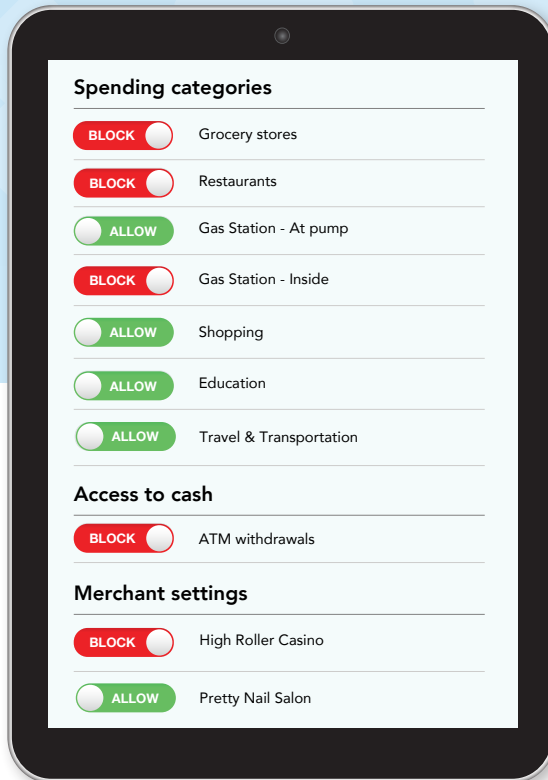
True Link — A better way to make SNT disbursements

Using a convenient online platform, trustees can configure the card for approved spending categories and merchants, and follow the Social Security Administration's guidelines. The Social Security Administration provided guidance for using the True Link Protection Visa Prepaid Card for SNT disbursements in the POMS¹.

True Link makes transferring and monitoring funds easy for trustees. And, for beneficiaries, the protections offered by the True Link Visa prepaid card can provide greater independence and convenience.

¹ Learn more at truelinkfinancial.com/compliance

Not associated with or endorsed by the Social Security Administration or any other government agency.



Trustees are in control of how and where funds are used while offering their beneficiaries the autonomy to more safely engage with the world.



True Link can save trustees time and help you provide better service:

- Fund flexibly; fund several cards at once, set up recurring transfers, or fund on-demand.
- View transactions as they occur from your online dashboard and receive (optional) real-time alerts or daily digests about purchases.
- Access real-time reports for audits, government or court reporting, or family updates.
- Resources available on how to optimize configurations and how to communicate with your beneficiaries about the card.
- Freeze cards instantly if stolen or lost, and, if found, simply turn back on.
- Let True Link field common inquiries from beneficiaries about balances and scheduled payments.



Protections and ease-of-use for your beneficiaries:

- True Link's own Scamwatch™ gives added protection against scams.
- Funds placed on the card are FDIC insured.
- Visa's Zero Liability Policy offers Visa's trusted protection from unauthorized charges.
- Cardholder can check balances via:
 - 1 – Online portal.
 - 2 – Calling customer service.
 - 3 – Text message.²

² Standard messaging rates may apply.



3 easy steps to get started

- 1 Visit truelinkcard.com and sign up for an account
- 2 Order card(s)
- 3 Set custom settings for each beneficiary and fund the cards

\$10 monthly fee

Have a question? A True Link team member can help you get set up.

"It's like... what did we do before smartphones or Google? That's what True Link is for trust administration"

– Irene,
Professional Trustee

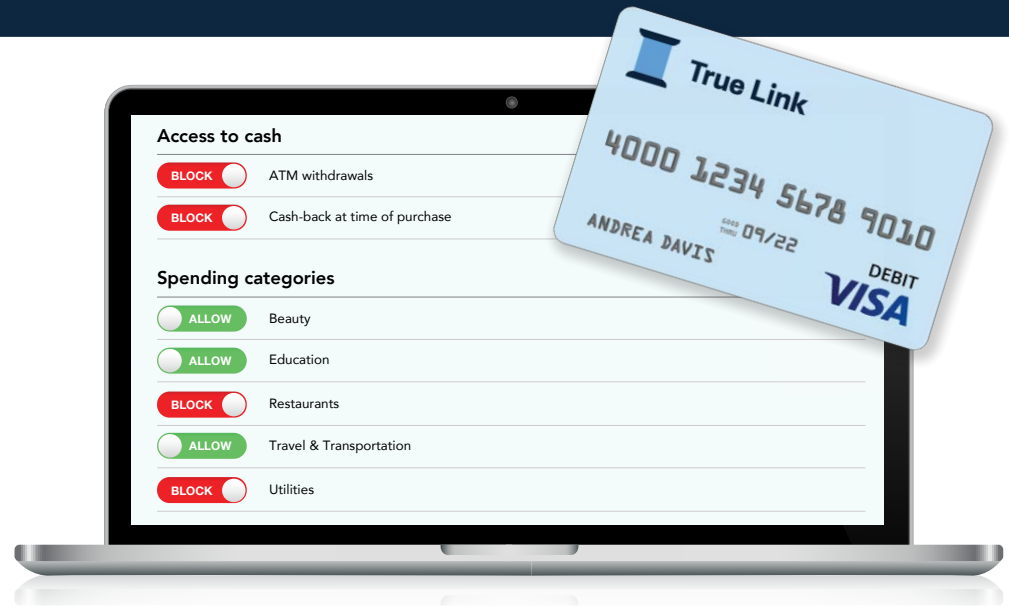
"The True Link Card makes life easier for both trustees and beneficiaries. The beneficiary can have some control over their money. They're able to buy what they want and the trustee will know that if it's not an approved item, the purchase won't go through."

– Kathleen,
Professional Trustee

"The True Link card will give them [beneficiaries] the latitude that most of us take for granted."

– Stephen,
Attorney Trustee

True Link is a financial services company for people with disabilities, vulnerable older adults, and people in recovery.



The True Link Visa® Protection Card — Protection for Beneficiaries; Ease of Use for Trustees

www.truelinkfinancial.com/trusteeSNT

888-554-5273

True Link Financial offers a suite of technology-based solutions designed specifically for special needs trusts, including the True Link Card, an administrator-managed prepaid card featured in the Social Security Administration's POMS, and software to manage disbursements, accounting, and reporting for trusts.

The True Link Protection Prepaid Visa® Card is issued by SUNRISE BANKS N.A., St. Paul, MN 55103, Member FDIC, pursuant to a license from Visa U.S.A. Inc. This card may be used everywhere Visa debit cards are accepted. Use of this card constitutes acceptance of the terms and conditions stated in the Cardholder Agreement.

