

## Questionnaire to Identify Trust Beneficiaries

We are often asked for assistance in determining which individuals qualify as Trust beneficiaries. It is our hope that the following questions help you determine if your program serves beneficiaries and, if it does, how many beneficiary groups it serves.

The following questions should be directed at your client in need to determine if he or she qualifies as a Trust beneficiary. If the client answers yes to one or more of the following questions then the client is most likely a Trust beneficiary.

*NOTE: A family member is someone who is being supported financially, living in the household of, or for whom your client has responsibility or guardianship.*

### Questions to Identify Trust beneficiaries

- Do you, or a family member, have any of the following conditions or received treatment in the past for any of the following conditions?
  - Mental illness
  - Developmental disability
  - Chronic alcoholism
  - Alzheimer's disease or related dementia
  - Traumatic head injury resulting in a permanent brain injury
- Have you, or a family member, sought long-term counseling (for more than six months) or mental health treatment from a counseling center or treatment facility?
- Have you, or a family member, been or are currently enrolled in special education or had an IEP (Individual Education Plan)?
- Do you, or a family member, have a severe and persistent history of prolonged or excessive drinking (consuming alcohol at least 6 days per week)?
- Have you, or a family member, been assessed or diagnosed as having an alcohol dependency or dysfunction?
- Do you, or a family member, have a loss of intellectual functioning (thinking, remembering, reasoning) so severe it interferes with daily life?
- Have you, or a family member, received a state developmental disability determination?