

# *CHARITABLE RESIDUAL ACCOUNT*



achieva



Family Trust

*Protecting Futures. Enhancing Lives.*



***PROVIDING PEACE OF MIND TO INDIVIDUALS  
WITH DISABILITIES AND THEIR FAMILIES SINCE 1998***

[AchievaFamilyTrust.org](http://AchievaFamilyTrust.org)

# ENHANCING THE LIVES OF OTHERS



**Some individuals and families lack the resources to access critical special needs support. The Charitable Residual Account provides supplemental supports and services for children and adults with disabilities and a demonstrated need.**

# HOW IT WORKS



When the beneficiary of a Pooled Trust has passed away, any existing funds become part of our Charitable Residual Account. Since 2005, we have been able to provide more than \$10,000,000 in goods and services to people with disabilities.

# HOW IT WORKS

- ✓ Each FY- The Residual Account is presented with a percentage of funding for disbursements thought the Program.
- ✓ Eligible applicants are individuals with disabilities throughout the state of Pennsylvania
  - ✓ Disabilities can include Intellectual disabilities, Mental Health disorders and Physical disabilities.
- ✓ The Residual request should be based on the needs of the applicant. The Charitable Residual Program will consider a wide range of requests from iPads, camps, recreational activities to medical equipment and home and vehicle modification

# THINGS TO CONSIDER

- All residual requests need to be submitted through the online application process including all supporting documents as the system requests.
  - Only completed applications will be considered for Review
- Applications are accepted ongoing throughout the year, however, there are quarterly deadlines for the submissions. These deadlines are
  - ***January 1<sup>st</sup>, April 1<sup>st</sup> July 1<sup>st</sup> October 1<sup>st</sup>***
  - Applications received after these deadlines may be held until the next quarter. (If the application is received on July 2, it would be held until the October review meeting.) We strongly encourage that all applications are submitted in advance of this deadline to provide sufficient time for our reviewers to make determinations. All applications that require discussion and/or follow-up will be reviewed by the last day of the month in which the quarter ends.
- Applicants are eligible to request funds once every 2 years. However, recreation and camp requests are considered on an annual basis.
  - Camp requests must be submitted no later than ***May 15<sup>th</sup>***

# THING TO CONSIDER

- Emergency Requests are considered on a case by case basis- Please contact Jennifer Stoyer 412-995-5000 ext 493 or [jstoyer@achieva.info](mailto:jstoyer@achieva.info) to discuss
- Achieva completes all of the purchases according to Approval dates. All checks will be sent directly to the vendor and never directly to the individual or family.
- Upon approval and purchasing, all receipts or copies of the paid invoices must be submitted to substantiate the purchase of the goods and services.
  - Reimbursements for items already purchased **WILL NOT** be considered.
    - Consider PATF got additional financial assistance.
      - <https://patf.us/>
      - <https://patf.us/apply-for-a-loan/loan-faqs/>

# RESIDUAL FAQ'S



**Who is Eligible?** Eligible applicants are individuals with disabilities throughout the state of Pennsylvania. Disabilities can include Intellectual, Mental Health disorders and Physical disabilities such as Cerebral Palsy and ALS. If there is a question regarding eligibility, please contact the Residual Account Coordinator at [412-995-5000 ext. 493](tel:412-995-5000).

## What are the Supporting Documents that are needed?

- ✓ All requests require several supporting documents. These documents are designed to provide our reviewers with additional information about the applicant and their specific needs. These documents are:
- ✓ **Letter of Support:** The letter of support is a letter written by a professional in support of the request. Examples of professionals who may submit a Letter of Support include Support/Service Coordinators, doctors, physical therapists, occupational therapists and teachers. The letter should contain sufficient details regarding why the item being applied for is necessary and how it will improve the individual's quality of life. The letter should be submitted on company letterhead and must be signed.
- ✓ **Bids:** Bids and/or estimates of the items being requested. Items over \$500 require two bids. These bids need to be for comparable items. All items need to be the same or similar and from two separate vendors. All shipping, tax and additional fees need to be reflected in the bid to get the most accurate requested amount. Please note that requests for iPads do not require bids.

# RESIDUAL FAQ's



**What is the Joinder Agreement and why do I need it?** The Joinder Agreement is a legal document that “joins” the applicant to our Pooled Trust. This step is necessary in order for us to disburse funds from our Pooled Trust to make the purchase. The Joinder Agreement needs to be uploaded to the online application for review, and the **original, signed (wet signature) Joinder Agreement** must be sent to Achieva Family Trust to the attention of the Residual Account Coordinator. If the application is approved, the Joinder Agreement is kept on file for future requests. Additional documents may be required based on the request category. If you have any questions regarding the additional documents, please contact the Residual Account Coordinator at [412-995-5000 ext. 493](tel:412-995-5000).

<https://www.achieva.info/resourcefiles/?id=17>

**How much can I request?** There is no limit to the amount of the request. However, we do ask that applicants take into account their needs as opposed to their wants when applying. For larger requests such as home modifications and vehicle modifications, the Residual Team will typically consider amounts up to \$10,000. However, there have been requests that have been approved above the \$10,000 amount based on compelling need. Please note that all requests will be evaluated in light of available funds and there are no guarantees or representations made regarding the receipt of funds.



# RESIDUAL FAQ's

**Does the Residual Program consider Home Repairs?** The Charitable Residual Program is NOT designed for home repairs. Examples of home repairs include but are not limited to the following: sewer lines, windows, AC and Furnace installation/repair, hot tubs, pools, fences and/or roofs. In addition, the Residual Program will not pay for an individual's bills, such as rent or utilities. The Residual Program will not consider Tuition or child care expenses.

**When will I know if I am approved?** As a general rule, once a completed application is submitted, it typically takes at least 15-20 business days for it to be reviewed and a decision to be made. It may take more time if follow up information is requested by the reviewers. For Applications that require extensive follow-up, we strive to make a decision within 30 days of the end of the quarter. You will receive notification via email after a determination has been made with instructions for the next steps. Because the amount of applications we receive varies, there may be times when we cannot meet these guidelines. We ask for your understanding and patience.

**If approved, when will I receive what I requested?** Our team works diligently to fulfill requests as soon as possible, but there is no timeline for when approved purchases are processed. They are fulfilled in the order they are approved whenever possible.



# RESIDUAL REQUEST



<https://achievafamilytrust.unicentric.com/Login/Index>

[AchievaFamilyTrust.org](https://AchievaFamilyTrust.org)

# CHARITABLE RESIDUAL ACCOUNT



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*Protecting Futures. Enhancing Lives.*

**Jennifer Stoyer**  
**Community & Charitable Trust**  
**Coordinator**

**412-995-5000 ext 493**

**[jstoyer@achieva.info](mailto:jstoyer@achieva.info)**

**AchievaFamilyTrust.org**

