



REQUEST FOR TRUST REVIEW

NORTH DAKOTA DEPARTMENT OF HUMAN SERVICES

LEGAL ADVISORY UNIT

SFN 1947 (11-2018)

Name of Applicant/Recipient	Date of Birth	Case Number
Name of Eligibility Worker	County	Telephone Number
<input type="checkbox"/> New Application (Date: _____)	<input type="checkbox"/> Ongoing Case	Date Review is Needed
Type of Benefit(s)		
<input type="checkbox"/> Medicaid Nursing Care	<input type="checkbox"/> Medicaid Non-Nursing Care	<input type="checkbox"/> ACA Medicaid Expansion
<input type="checkbox"/> LIHEAP	<input type="checkbox"/> Other (specify): _____	<input type="checkbox"/> SNAP

Information below is not needed for SNAP

Is this review for an asset assessment? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Spousal, Name of Applicant/Recipient's Spouse
Is this a spousal impoverishment case? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Spousal, Date Applicant/Recipient Entered Nursing Home or HCBS

Is Applicant/Recipient the:

Trustor (individual who established the trust)? Yes No

Trustee (individual who manages the trust)? Yes No

Beneficiary (recipient of the income or assets of the trust)? Yes No

Is this a possible disqualifying transfer? Yes No

Attach the following:

A copy of the entire trust document (signed, dated, and notarized)

All attachments, including the Schedule or Exhibit listing the trust property

Deeds transferring property to or from the trust (if applicable)

Other relevant documents relating to trust assets, which indicate the following information:

- What assets were transferred to the trust
- When the asset was transferred to the trust
- Who transferred the asset to the trust
- Whether any assets were removed from a revocable trust

If any of the information requested above is missing, it may result in delays in the Legal Advisory Unit's ability to complete your request.

Send information to:

Department of Human Services
 Legal Advisory Unit
 State Capitol - Judicial Wing
 600 E Boulevard Ave - Dept 325
 Bismarck ND 58505-0250