A request to purchase a vehicle, house, modular home etc. for an adult account holder using funds from a supervised IIM account is a major consideration. A caretaker/guardian may request funds from an adult account holder’s supervised IIM account to benefit the account holder’s health and welfare. This must be clearly explained in an assessment, and evaluation of available financial resources for all major purchases. The additional following questions must also be answered:

|  |  |
| --- | --- |
| 1. Name of Account holder & Account #:
 |  |
| 1. Current balance in the supervised IIM account:
 |  |
| 1. What funds (trust, per capita, SSI, are going into his or her supervised IIM account, and how often?
 |  |
| 1. What is being purchased (provide a description) and the cost ?
 |  |
| 1. What is the plan to pay for the purchase, and other associated costs, e.g. taxes, utilities, insurance etc. Will these costs come from the IIM account or are others contributing to the purchase? Whose name will be on the title of the purchase?
 |  |
| 1. Describe any extenuating circumstances regarding the request for the purchase.
 |  |
| 1. What are the account holder's current health and welfare needs that this purchase will address e.g. homeless, diabetic/receiving dialysis, wheelchair bound, partial paralysis, medical appointments-frequency and distance to appointments, available transportation to daily events and cost related to that activity etc.
 |  |
| 1. Who will be the principle owner of the purchase?
 |  |
| 9. Who will be responsible for maintenance and upkeep of the purchase? |  |
| 10. **For a Vehicle Purchase:** Does the principle driver possess a valid state driver's license?Who will purchase and how will be paid for?Who will keep the vehicle?Where will it be kept?Who will be responsible for car insurance, and how much will that be?  |  |
| 11.Additional Narrative: |  |

Regional Director: Date: Approved: Denied: