



Vehicle Purchase Form

Any purchase of a vehicle must be **pre-approved** by the Trust Administrator. Please do not take possession of a vehicle until the trust administrator has approved the vehicle purchase and issued payment for the vehicle. The following steps must be followed:

- Send a signed copy of this form to the Trust Administrator.
- Provide a copy of the CARFAX Vehicle History Report.
- Provide a copy of your valid driver's license.
 - The Trust Administrator may approve a vehicle purchase for a disabled minor or adult beneficiary for whom regular transportation is provided by a parent or another adult with whom he/she lives.
- The Trust must be listed as the lien holder on the title.
- Proof of insurance is required.
- You must comply with state regulations to keep your vehicle registered and inspected yearly and forward proof of the same to the administrative offices.
- GCT of BDI has the right to decline the purchase of any vehicles utilizing Special Needs Trust funds.
- GCT of BDI does not approve the purchases of luxury vehicles.

Purchaser Information:

Beneficiary Name: _____ Driver's Name: _____
 Relationship to Beneficiary: _____

Vehicle Information:

Make (Chevy, Ford, etc.): _____ Model (Malibu, Focus, etc.): _____
 Year: _____ Color: _____ Mileage: _____ Cost: _____

Seller's Information:

Dealership: _____ Salesman: _____
 Seller's Name (if private sale): _____ Phone Number: _____
 Address: _____

Lien Information:

All titles must be held in the Beneficiary's trust file with GCT of BDI as the lien holder in compliance to Social Security and Medicaid POMS and Guidelines. Listed below are the Electronic Lien and Title numbers:

Florida:	0609956201
Georgia:	100221496320

- Please attach a copy of the Vehicle Bill of Sale.
- I have reviewed and understand all the steps in the vehicle purchase process and agree to complete all necessary steps before purchasing a vehicle.
- By signing below, I attest the information provided is true and correct and that the purchase of this vehicle is for the sole benefit of the beneficiary. I understand that the vehicle is considered an asset of the Beneficiary's Trust and upon passing may be liquidated to fulfill any Medicaid lien requirements.

<i>(Beneficiary is the person for whose benefit the Trust has been established)</i>	
Name of Beneficiary (Please Print)	Name of Advisor (Please Print)
Signature of Beneficiary (if over 18)	Signature of Advisor
Phone Number	Date

Mail or email this completed form to:

2120 Marietta Blvd NW | Atlanta, GA 30318 | Email: Hollis.Johnson@BobbyDodd.org

For official use only:	
Approved By: _____	Date: _____

Acknowledgements: After reading acknowledgements this form must be signed and notarized.

Program Operations Manual System (POMS)

Effective Dates: 01/14/2015 - Present

TN 71 (01-15)

SI 01130.200 Automobiles and Other Vehicles Used for Transportation

CITATIONS:

Regulations 20 CFR [416.1218](#)

The SSA Digital Library (has a link to the National Auto Dealers Association (NADA) Online for verification of the value of cars (SSI resources).

A. Background of Automobile Exclusion

Based on a change in the regulations effective March 9, 2005, the resource exclusion for automobiles changed. For resource determinations beginning April 2005, we exclude completely one automobile per household regardless of value if the recipient or couple or a member of the recipient's or couple's household uses it for transportation.

B. Definitions for Automobile Exclusion

1. Automobile

For Supplemental Security Income (SSI) purposes, "automobile" means **any** registered or unregistered vehicle used for **transportation**. Vehicles used for transportation include but are not limited to cars, trucks, motorcycles, boats, snowmobiles, animal-drawn vehicles, and even animals.

A temporarily broken-down vehicle normally used for transportation meets the definition of an automobile. For more on inoperable automobiles see [SI 01130.200E.3](#).

[SSA - POMS: SI 01130.200 - Automobiles and Other Vehicles Used For Transportation - 01/14/2015](#)

This form must be signed to acknowledge Social Security Guidelines, POMS, only allowing one vehicle per household.

For Supplemental Security Income (SSI) purposes, "automobile" means **any** registered or unregistered vehicle used for **transportation**.

(Beneficiary is the person for whose benefit the Trust has been established)

Name of Beneficiary (Please Print)

Name of Advisor (Please Print)

Signature of Advisory Co-Trustee

Notary Public Signature/Seal

Phone Number

Date