



Community Fund Ohio
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About Community Fund Management Foundation Pooled Trusts

Community Fund Management Foundation Pooled Trusts are designed to safeguard eligibility for most means-tested government benefits, such as Medicaid and perhaps Supplemental Security Income (SSI). Community Fund Management Foundation dba Community Fund Ohio is the Trust Advisor and Huntington National Bank is the Trustee.

Funds held in the Trust Accounts should not be counted as an available resource for the Ohio resident with a disability, also known as the Beneficiary. Because the investments in the Trust Accounts are “pooled,” a separate ledger is maintained for each Beneficiary and financial information is reported on a quarterly statement.

Community Fund Ohio administers two types of Pooled Trusts: the Pooled Medicaid Payback Trust and the third-party Master Trust.

Our **Pooled Medicaid Payback Trust** is irrevocable. The most recent Trust Agreement has been approved by the Social Security Administration and is drafted to comply with:

- 42 U.S.C. 1396p(d)(4)(C)
- 42 U.S.C. 1382b(e)
- Ohio R.C. 5163.21(F)(3)(a)
- Ohio Adm. Code 5160:1-3-05.2(C)(3)(c)
- POMS SI 01120.203

Our **Master Trust** may be revocable or irrevocable at the time it is established. It automatically becomes irrevocable at the death of the grantor (or the death of the last surviving grantor if there is more than one grantor). The **Master Trust** is drafted to comply with:

- Ohio R.C. 5163.21(G)
- Ohio Adm. Code 5160:1-3-05.2(C)(4)
- POMS SI 01120.200