

REQUEST FOR DISBURSEMENT FORM



Beneficiary Name: _____

Beneficiary Ph #: _____

Request Made By (name): _____

Phone #: _____

REQUESTED BY (check one):

☐
☐

GUARDIAN/SPECIAL TRUSTEE

Other: _____

ITEM/SERVICE DESCRIPTION (describe # of items, details of receipts/invoices/online purchase)	TOTAL \$ AMOUNT
1	
Check one: <input type="checkbox"/> Direct Payment to Vendor <input type="checkbox"/> ALE Acct	<input type="checkbox"/> Reimbursement Request with receipts <input type="checkbox"/> Trust Assistance <input type="checkbox"/> True Link
Payee name: _____	
Address: _____	
Phone #: _____	Attachment(s) (Check Box): <input type="checkbox"/> # of Attachments: _____
Bank Name: _____	Routing #: _____ Account# _____
2	
Check one: <input type="checkbox"/> Direct Payment to Vendor <input type="checkbox"/> ALE Acct	<input type="checkbox"/> Reimbursement Request with receipts <input type="checkbox"/> Trust Assistance <input type="checkbox"/> True Link
Payee name: _____	
Address: _____	
Phone #: _____	Attachment(s): <input type="checkbox"/> # of Attachments: _____
Bank Name: _____	Routing #: _____ Account# _____
3	
Check one: <input type="checkbox"/> Direct Payment to Vendor <input type="checkbox"/> ALE Acct	<input type="checkbox"/> Reimbursement Request with receipts <input type="checkbox"/> Trust Assistance <input type="checkbox"/> True Link
Payee name: _____	
Address: _____	
Phone #: _____	Attachment(s): <input type="checkbox"/> # of Attachments: _____
Bank Name: _____	Routing #: _____ Account# _____

Please check attachment box and include all relevant invoices/receipts for prompt payment.

Email to: Requests@lifesplaninc.org

Mail: Life's Plan Inc. 901 Warrenville Rd. Ste 500 Lisle, IL 60532

Fax: 630-628-2350

or go online to: www.lifesplaninc.org under resources/request form to make requests

"TO ENSURE TIMELY AND ACCURATE DELIVERY OF YOUR REQUEST

Please complete our request form and include **SUBMITTED PHOTOS OF INVOICES AND RECEIPTS**.

When uploading your photos, **MAKE SURE TO SELECT THE SMALLEST SIZE**. Sending too many large photos may prevent your submission from going through.

Thank you for helping us process your request quickly and accurately."