

**PROBATE COURT OF SUMMIT COUNTY, OHIO
ELINORE MARSH STORMER, JUDGE**

IN THE MATTER OF:

- THE GUARDIANSHIP OF: _____
- THE TRUSTEESHIP OF: _____

CASE NO. _____

MOTION TO ESTABLISH AND FUND QUALIFIED INCOME TRUST

[OAC 5160: 1-3-05.2] [OAC 5160: 1-6-03.2]

- 1) The Applicant is Guardian of the person and/or the estate
 A person who has authority to manage the income of the beneficiary for the above named individual
- 2) The Ward/Beneficiary has income that exceeds the Special Income Limit necessary to qualify for Ohio Medicaid.
- 3) Said income is being deposited into account number _____ at
(last 4 numbers of account)

(Financial Institution)
- 4) In order to qualify for Medicaid Long Term Care Services, any income in excess of the Special Income Limit must be transferred into a Qualified Income Trust account each month.
- 5) The applicant has attached a copy of the proposed Qualified Income Trust. The applicant represents that the attached trust document is in compliance with Section 1634 of the Social Security Act and complies with the requirements set forth therein. The applicant further agrees to comply with all rules, regulations and reporting requirements set forth by the Ohio Department of Medicaid in administering the Qualified Income Trust attached hereto.

WHEREFORE, the Applicant moves this Court for an Order allowing Applicant to:

- 1) Establish a Qualified Income Trust for the Ward/Beneficiary appointing:
_____, a suitable person, as
(Name, Address, Phone Number)
Trustee, pursuant to Exhibit "A" attached.
- 2) Transfer monthly income of the Ward/Beneficiary from the account where it is originally deposited into the QIT account as necessary to qualify him/her for Long Term Care Medicaid benefits.

CASE NO. _____

Respectfully submitted,

Attorney for Applicant

Applicant Signature

Typed or Printed Name

Applicant Printed Name

Address

Address Line 1

City State Zip

Address Line 2

Phone

Phone

Email

Email

Attorney Registration Number: _____