

CALFRESH PROGRAM RESTRICTED ACCOUNT AGREEMENT PART A

CASE NAME	CASE NUMBER
COUNTY WORKER NAME	WORKER NUMBER

Read and initial each of the rules below.

Initial	I Understand:
	Funds must be kept in a financial institution, such as a bank, credit union, savings and loan, etc., and all funds in my Restricted Account must be kept separate from any other account.
	I must give proof of account information. Some examples of account information include: <ul style="list-style-type: none"> - Bank statement or receipt from a bank, credit union etc. that shows the name and address of the bank - All account balances and activity since the date you signed the Restricted Account Agreement - The name(s) on the account(s)
	I understand some examples of proof of how I spent funds withdrawn from the Restricted Account(s), include the following: <ul style="list-style-type: none"> - Cancelled check(s) - Signed statement(s) from the provider(s) of goods or services that shows the type and amount of the expense(s) paid - Receipt(s)
	This Restricted Account Agreement stops: <ul style="list-style-type: none"> - When I don't give the worker proof about the Restricted Account - When my family is discontinued from CalFresh benefits - When the Restricted Account is closed - If the Restricted Account law changes
	There is not a limit on the maximum amount of savings in a restricted account. I can have more than one restricted account, and funds in all restricted accounts do not count against my family's resource limit.
	If my CalFresh benefits stop for any reason, and if I reapply for CalFresh benefits, and there is a break in benefits, my total countable resources, including any money in the Restricted Account(s), cannot be more than the \$2,000/\$3,250 resource limit. I must enter into a new Restricted Account Agreement at application to start a new Restricted Account. A Restricted Account Agreement is required if there is a break in aid.
	If funds from my Restricted Account(s) are withdrawn and are not spent for an allowable expense, even when I have expenses for a death or life-threatening emergency, the withdrawn amount will count toward the resource limit and the county will re-evaluate all resources.
	The need to have resources close to my \$2,000 resource limit (\$3,250 if there is at least one household member who is disabled/age 60 or older) for emergencies or other expenses before I start a Restricted Account.
	If I report income and household changes semi-annually and withdraw funds during the semi-annual period, I am required to report the withdrawal on the next income report (SAR 7) or recertification that is due. If I am not a Semi-Annual Reporting household, I must report withdrawals within 10 days of the withdrawal.
	Interest earned on my Restricted Account(s) must be deposited directly into the account(s). If interest is sent to me, I must put it back into the Restricted Account.
	Money saved in a Restricted Account can only be spent for one or more allowable expenses directly related to: <ul style="list-style-type: none"> - Purchase of a home that I will live in - Starting up a new business - Education or job training for the account holder and his/her dependent(s)

Certification

I have read the coversheet. I understand the rules and my responsibilities as initialed above for starting and keeping a Restricted Account, and the need to have resources close to my \$2,000 resource limit or \$3,250 (if there is at least one household member who is disabled or who is age 60 or older) for emergencies or other expenses before I start a **Restricted Account**. I will ask my worker if I am not sure what is an allowable expense, what proof I need, or when the proof must be given to the county.

SIGNATURE OR MARK OF HEAD OF HOUSEHOLD OR AUTHORIZED REPRESENTATIVE	DATE
SIGNATURE OR MARK OF WITNESS AND/OR INTERPRETER	DATE