

WAC 365-220-100 When and how may individual accounts be transferred? A primary representative may request governing board approval for a transfer of an account to another special needs trust. This must be done through written correspondence to the governing board stating the reasons for the request. The governing board shall review all requests for transfers. Only the governing board or its designee may approve transfers. Any such transfers shall be consistent with the master trust and federal and state law.

The primary representative must contact the trust manager to initiate the funds transfer.

[Statutory Authority: RCW 43.330.430 through 43.330.437. WSR 20-01-152, § 365-220-100, filed 12/17/19, effective 1/17/20; WSR 19-07-034, § 365-220-100, filed 3/13/19, effective 4/13/19. Statutory Authority: RCW 43.330.240. WSR 02-07-026, § 365-220-100, filed 3/12/02, effective 4/12/02.]