

Department of Social and Health Services

Olympia, Washington

EAZ Manual

Revision	# 1258
Category	Completing the Process
Issued	01/24/2024
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Summary

Updated Worker Clarification under [WAC 388-470-0045](#) to align the increase in allowable assets in [2SHB 1447](#).

See below for edited text:

How Resources Count

Revised January ~~26~~²⁴, 202~~43~~

Purpose:

WAC 388-470-0045 How do my resources count toward the resource limits for cash assistance?

- ~~Clarifying Information and Worker Responsibilities~~

WAC 388-470-0055 How do my resources count toward the resource limits for Basic Food?

- Clarifying Information

Clarifying Information - WAC 388-470-0045

Applicants and recipients of cash ~~benefits~~assistance can have up to \$~~126~~¹²⁶,000 in liquid resources.

Some examples of liquid resources for cash assistance programs are:

1. Cash on hand;
2. Money in checking and savings accounts;
3. Money market accounts or certificates ~~for~~of deposit (CD or COD) less any withdrawal penalty;
- ~~4. Available retirement funds or pension benefits less any withdrawal penalty;~~
- ~~5.4.~~ Stocks, bonds, annuities, or mutual funds less any early withdrawal penalty;
- ~~6.5.~~ Available trusts or trust accounts;
- ~~7.6.~~ Lump sum payments.

Some examples of excluded resources for cash assistance programs are:

1. Personal property of great sentimental value;
2. Bona fide loans, including student loans;
3. Benefits from the Basic Food Program;
4. Income tax returns or Earned Income Tax Credit (EITC)₁ for up to twelve months;

5. Washington state Working Families Tax Credit (WFTC);

5-6. Available retirement funds or pension benefits;

6-7. One burial plot for each AU member;

7-8. The income and resources of an SSI recipient; and

8-9. Real property that is:

- a. Your home and surrounding property;
- b. Indian lands held jointly with a tribe; and
- c. Property that you 'are trying in good faith to sell, intend to build a home on, or that produces income consistent with it's fair market value.

9-10. A trust fund when:

- . A household member can't revoke the trust or change the beneficiary;
 - a. The trustee administering the funds isn't under the direction of a household member or is appointed by the a court with court-imposed limitations on how the funds are used;
 - a-b. The applicant/recipient must petition the court to release part or all of a resource, including funds in blocked accounts or trusts. Review the status at each recertification/eligibility review.
 - b-c. The funds are used solely to make investments on behalf of the trust, or pay for medical or educational expenses, for a specific household member; and
 - e-d. The investments made on behalf of the trust don't directly involve or assist any business or corporation under the control, direction, or influence of a household member.

~~The applicant/recipient must petition the court to release part or all of a resource, including funds in blocked accounts or trusts. Review the status at each recertification/eligibility review.~~

10-11. Real Property

- . Public rights of way, such as roads that run through the surrounding property and separate it from the home, don't affect the exemption of the property.
 - a. Definition of a "good faith effort to sell" real property:
 - i. Listing the property with a real estate company;
 - ii. Actively showing the property;
 - iii. Placing signs on the property and ads in the newspaper; and
 - iv. Asking a price that is at or under fair market value (FMV).

Real and Personal Property Used for Self-Employment

1. For cash assistance, real and personal property used for self-employment are excluded if:
 - a. The property is necessary to restore the independence or will aids in rehabilitating the applicant/recipient or their dependents; and

- b. The applicant/recipient has an approved self-employment plan; and
 - c. For WorkFirst participants, the self-employment enterprise is a component of the participant's approved Individual Responsibility Plan (IRP).
2. Examples of real or personal property used in a self-employment business include:
- . Farm Land;
 - a. Farm Machinery;
 - b. Livestock;
 - c. Business Equipment;~~and~~
 - d. Business Inventory.
3. For non-WorkFirst participants, an approved self-employment plan must include:
- . A time frame that the applicant/recipient's business will produce enough income to reduce the assistance unit's need for cash assistance;
 - a. A requirement for the applicant/recipient to give the department adequate verification to verify the business' assets and expenses on a monthly basis. See: [Income - C. - Special Income Types](#); and
 - b. A statement of understanding between the applicant/recipient and the department that the real and personal property of the business will be excluded as long as there is an agreed plan.

Note: If the applicant/recipient doesn't sign an agreed plan, the value of all real and personal property of the business ~~will~~ counts toward the assistance unit's resource limit.
