

# MINOR TRUST ACCOUNTS



## NEW FINANCIAL CLASS CHANGES AFTER JAN. 1, 2024 FOR ANY DISTRIBUTION!

### STEP 1

#### PRIOR TO 1ST DISTRIBUTION

Must complete **CASH** and **VIRTUAL** classes



#### IN-PERSON CLASSES

Cash Class Dates (2:30PM-5:00PM)

January 12	May 17	September 13
February 23	June 21	October 25
April 5	August 2	December 6



#### DISTANCE LEARNING

Cash Class Dates (3:30PM-6:00PM)

January 30	July 16	November 12
March 26	October 8	

#### Register for any session

- 1 Email: [mriveira@tulaliptribes-nsn.gov](mailto:mriveira@tulaliptribes-nsn.gov)
- 2 Call: 360-716-4300
- 3 <https://www.tulaliptribes-nsn.gov/Dept/MinorTrustAccounts>

### STEP 2

#### VIRTUAL CLASS



Any time, just email Enrollment to get registered!

### STEP 3

#### PRIOR TO 3RD DISTRIBUTION

Meet with financial advisor



#### FINANCIAL ADVISOR

Provided from Tulalip or any other outside professional financial advisor

Jan 29 - Feb 2	Jul 29 - Aug 2
Feb 26 - Mar 1	Aug 26 - 30
Apr 22 - 26	Sep 23 - 27
May 20 - 24	Oct 28 - Nov 1
Jun 24 - 28	Nov 18 - 22

LUMP SUM WILL NEED TO DO STEPS 1-3 PRIOR TO THE DISTRIBUTION

**MAKE SURE YOU PLAN AHEAD SO THERE IS NO DELAY IN GETTING YOUR FUNDS!**

#### DISTRIBUTION EXAMPLE\* if followed yearly schedule

Apply yearly in the same month you applied for 1st distribution

June 15, 2024	1st Distribution
June 1 to 30, 2025	2nd Distribution
June 1 to 30, 2026	3rd Distribution
June 1 to 30, 2027	4th Distribution

There are early release and lump sum options. Please inquire with Enrollment staff. \* Dates in table are an example.

