



NEWS

U.S. DEPARTMENT OF THE INTERIOR

OFFICE OF THE SPECIAL TRUSTEE FOR AMERICAN INDIANS

FOR IMMEDIATE RELEASE

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Interior Trust Officers Distribute More Than \$50 Million in Trust Funds to Former “Whereabouts Unknown” Indian Beneficiaries

As part of efforts to reform the management of the Indian trust, Fiduciary Trust Officers have distributed more than \$50 million dollars to Indian trust beneficiaries whose whereabouts were previously unknown. These people had an Indian trust account, but Interior did not have current addresses or contact information to distribute their funds to them.

- **In fiscal year 2005, \$26.2 million was distributed to 19,415 beneficiaries.**
- **In fiscal year 2006, \$24.9 million was distributed to 15,322 beneficiaries.**

Trust Officers found people through collaborative efforts between the Office of the Special Trustee for American Indians, Bureau of Indian Affairs, and tribal governments.

Here are just a few of their stories:

Jim Folsom, Fiduciary Trust Officer in Fort Duschene, Utah, helped find a beneficiary who had more than \$100,000 in an Indian trust account. Early in the year, Folsom received a list of trust beneficiaries whose whereabouts were unknown. He began asking locals, BIA staff and tribal members if they knew anyone on the list. Local residents recognized the name as a man living in a nearby state-run group home. Folsom is now working with local aid agencies to make sure the money gets used properly for the beneficiary’s care. “I’m determined to make sure it improves the quality of his life,” Folsom says.

Patricia Appl, Fiduciary Trust Officer in Wewoka, Oklahoma and her staff have been working to find people on the whereabouts unknown list at the Seminole Nation. The staff gathered addresses from the tribe, and searched files for similar names. One of the people they found appeared to have three addresses. Appl mailed letters seeking (continued)

responses to all of the addresses. A man responded who matched the identification available in Interior's Indian trust accounting system. It turns out he was one of the people on Appl's list who had the most money in an account; when all paperwork was complete, the man was issued a check for about \$34,000.

Clarrisa Bright Wings, a staff member at the Crow Agency in Montana, located a woman who had almost \$90,000 in a whereabouts unknown account. The woman was elderly, and in need of assistance. Bright Wings and trust officer Kevin Bailey were able to work with the local Bureau of Indian Affairs Social Services office to establish a supervised account for the beneficiary to ensure that her best interests would be properly addressed. In March, the Crow Agency staff found five WAU beneficiaries with a total of \$108,545.

Mitchell Stephens and his team at the Horton Agency in Kansas found more than 111 people on the whereabouts unknown list last year. Account technician David Jenkins confirmed that one local man had been adopted at birth. Jenkins worked with the man to prove he was the rightful owner of the account, and then sent him to his tribe's offices because Jenkins knew the tribe may be holding judgment or per capita funds on his behalf. The man was overwhelmed with the amount of money coming his way; he paid off his home, and kept the rest to use for retirement. Staff members were able to disburse more than \$280,000 to whereabouts unknown beneficiaries in the Horton area last year. (Stephens is now the trust officer in Anadarko, Oklahoma).

Karen Whitenton, Fiduciary Trust Officer in Carson City, Nevada found a man with \$40,000 in his account through the beneficiary's grandparents. When he was younger, the beneficiary and his mother had moved around a lot. His grandparents helped Whitenton identify their grandson. With three small children, the beneficiary assured Whitenton the money was much needed.

All Trust Officers across the nation continue to work to find these "whereabouts unknown" trust beneficiaries; there are still more than 50,000 people on the list. If you know someone who might be a "whereabouts unknown," check www.doi.gov/ost and click on "Locating IIM Account Holders." Or call the toll-free Trust Beneficiary Call Center at 1-888-678-6836.