



Acceptance Guidelines for Pooled Income Funds (PIF)

1. The minimum contribution to a pooled income fund is \$5,000.
2. Additional contributions may be made to an existing fund, in increments of \$1,000 or more.
3. The minimum age for life income beneficiaries is 50 years.
4. There shall be a maximum of two life income beneficiaries per fund.
5. Contributions may be made with cash and publicly-traded securities.