



THERESA POOLED TRUSTS
250 Lido Boulevard, Lido Beach NY 11561
877-391-0390 • TPT@theresafoundation.org
www.theresapooledtrusts.org

THERESA POOLED INCOME TRUST

Instructions for Establishing an Account

Complete the name of the beneficiary on the Joinder Agreement. The beneficiary, or an authorized agent of the beneficiary, must sign, date, and have the Joinder Agreement notarized. The notarization must be legible, and the date must match the signature date.

If someone is signing on behalf of the beneficiary, please include the documentation of their relationship to the beneficiary that gives them the authority to sign. Examples: Power of Attorney, Guardian, Parent, Grandparent, or by a Court Order.

Please complete each page of the Exhibits and return the original with the Joinder Agreement. Please make sure you include a copy of the beneficiary or authorized agent's photo ID, as well as documentation showing their authority to sign on behalf of the beneficiary.

Trust Funding and Submission of Trust Documents

Please remember to enclose a check for the \$150.00 opening fee along with your completed Agreement. The check should be payable to: "Theresa Pooled Income Trust" and should have the name of the beneficiary in the memo line.

Please return your completed, signed, and notarized Joinder Agreement, along with your check and completed Exhibits to the Trustee at the following address:

CLC Foundation, Inc.
135 Radio Circle Drive, Suite 211
Mount Kisco, New York 10549
Attention: TPIT

Upon acceptance of your Agreement, you will be provided a welcome letter with additional information regarding future deposits as well as Policy and Procedures.