



Pooled Life Income Fund

A Pooled Life Income Fund is a highly popular, simple way to earn income and participate in the securities markets while also making a significant gift to the Gregorian University Foundation.

Recent tax law changes have enhanced the potential value of this charitable planning option.

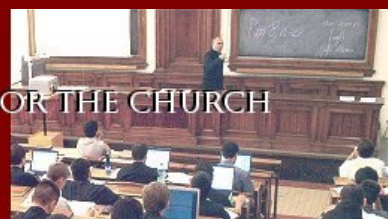
What is a Pooled Life Income Fund?

1. You transfer a gift of cash, cash-equivalent, or marketable securities to the Foundation's Fund.
2. You earn an income tax charitable deduction for part of the contribution.
3. You and/or someone you designate receive income distributions from the fund for life in proportion to the value of your contribution and subsequent gain.
4. At the end of the relevant lives, the remaining assets are distributed to the Gregorian University Foundation.

Why should you consider a Pooled Life Income Fund?

- Make a major contribution to the Gregorian University Foundation that you otherwise couldn't afford.
- Generate a stream of income for life.
- Income taxes on dividends may qualify for lower 15% rate.
- Earn an income tax deduction and remove assets and future growth from estate taxation.
- Avoid capital gain tax liability on contributed assets.
- Take advantage of the Foundation's successful record of investment growth.
- Arrange an income stream to support a spouse or heirs.
- Choose between Funds that seek to either maximize current income or generate income growth over time.
- Diversify a concentrated investment portfolio.
- Easy to make additional contributions for more income.

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How can the Gregorian University Foundation be of assistance?

Charitable planning is a highly specialized skill. We have staff specialists and resources available to support both your investigation and implementation of gift planning techniques. Our services are professional, confidential, collaborative and provided without cost or obligation. We encourage you to call on us to assist you, your family and advisors in exploring charitable opportunities in estate and financial planning.

Gregorian University Foundation

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