



Date

Name

Street

City

Salutation:

Thank you for your interest in the Western New York Coalition Pooled Trust. We have enclosed an application, a list of required documents, a copy of the Trust, a Frequently Asked Questions sheet, a fee schedule, the Department of Health Disability form, the Disability Questionnaire, a referral list of private attorneys you can hire to help you with the application process as well as the Joinder Agreement. Please note that the application must be reviewed by an attorney.

If you are interested in joining our Trust, please complete the application and include any additional required documents, *in full* and return it to People Inc. 1219 North Forest Road, Williamsville, NY 14221 to the attention of WNY Coalition Pooled Trust. Upon receipt of the documents we will review the information and contact you with any questions or instructions regarding the next steps.

Since this is a Trust for individuals age 65 and over, you will have to be deemed “disabled” by the New York State Department of Health. Please complete the enclosed New York State Department of Health Disability forms. If you live in Orleans County please return it to: Diana Kephart, Orleans County Department of Social Services, 14016 Route 31 West, Albion, NY 14411. Once you have been deemed to be disabled, Ms. Kephart will send you proof of disability.

Once all required documents are complete, the Management Committee of the WNY Coalition Pooled Trust must vote to approve your acceptance into the Trust. The committee meets the second Monday of each month. To be eligible for consideration at the monthly meeting, your complete paperwork must be submitted at least one week prior to the meeting. Otherwise, your application will be held over to the next month.

You will be mailed notification of acceptance into the trust. Once your account has been set up, you will receive a “Welcome Packet” with further instructions. If you have any questions, additional information can be found at www.wnypooledtrust.org, or you may call us at 1-866-362-5081. We look forward to serving you.

Very truly yours,

Staff of the WNY Coalition Pooled Trust

1-866-362-5081
www.wnypooledtrust.org