

Criteria	Requirements	Requirements	Proof	Or
Income	Individual	At least \$200K income for past two years	IRS form: Form W-2, Form 1099, Schedule K-1 to Form 1065, and Form 1040.	Written confirmation from: a registered broker-dealer, an SEC registered investment advisor, a licensed attorney in good standing, a registered CPA.
	Joint (with spouse or spousal equivalent)	At least \$300K joint income for the past two years		
Net Worth	Individual	Net worth of at least 1M, not including primary residence	For assets: Bank statements, brokerage statements and other statements of securities holdings, certificates of deposit, tax assessments, and appraisal reports issued by independent third parties.	
	Joint (with spouse or spousal equivalent)	Net worth of at least 1M as a couple, not including primary residence	For liabilities: A consumer report from at least one of the nationwide consumer reporting agencies. All documents must be dated within the last three months.	
Professional Designation	Individual	Holder in good standing of Series 7, Series 65, and Series 82 licenses	Certificate or licensure for professional designation	