



## **Trust Transfer Program Prospecting Letter 1**

Date

Name  
Address  
City, State Zip

Dear Prospect:

Over time, banks and their trust departments have undergone major structural changes. Multistate bank holding companies have, in many cases, transformed the "local bank" into a provider of diversified financial services, charge cards, home equity loans, mortgages, mutual funds, etc.

As a result, certain personal trust services can and often do get lost in the shuffle. In addition, many banks are now strictly investing their personal trust accounts in shares of their proprietary mutual funds. Leaving trust clients with limited investment choices.

If you are a beneficiary of a trust, or have established a trust at a local bank trust department, it could be time, and to your advantage to explore personal trust services with Reliance Trust Company ("Reliance"). Reliance is an independent trust company with a different way of doing business by offering personalized, affordable trustee services delivered with the highest levels of customer service. Reliance also provides specialized investment management services for your personal trust assets.

Working together with Reliance, we can provide you with objectivity and access to a wide array of investments and services designed to fulfill the specific investment objectives of your trust. Please give me a call for a personal appointment to review your current trust relationship.

Sincerely,

Financial Adviser Name,  
Title