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## Trust Transfer Program

### Sample Ad or Seminar Invitation

**Everything you Need to Know About  
Corporate Trustees...  
(But Were Afraid to Ask)**

- Do you wish your trustee listened more carefully to your interest?
- Do you reach him in a service center where you feel more like a number than a real person?
- Do you wonder why your corporate trustees don't offer alternatives to proprietary bank funds and in-house portfolio managers?
- Do you think he should be offering a broader selection of the best managers and funds available?
- Do you walk away from meeting with your corporate trustee thinking, "What my family needs is a "friendly consultant," not a "hostile trustee."

**DAY, DATE**

Wine and Cheese Reception

**HOTEL**

Address

City, State Zip

000 / 000-0000

6:30 pm – 8:00 pm

There is no cost or obligation; however seating is limited.  
Please RSVP to Name @ 000 / 000-0000

Financial Adviser

Address

City, State ZIP