



Trust Transfer Program Telephone Script

Hello, (client name). How are you? Did you have a chance to read the letter and material I sent you on the personal trust services available from Reliance Trust Company?

If yes: Are you currently receiving income from a trust that has been established for your benefit, or are you the grantor of an existing trust:

If not: (You may want to invite them in to discuss the benefits of a trust.)

If yes: Are you satisfied with the services you are receiving from the current trustee?

If yes: (You'll want to be prepared with another area of expertise that they would be interested in.)

If not: Then I propose that we review the trust document to determine if it includes "portability provisions," which allow you to remove the current trustee and replace them with Reliance Trust Company, as the new trustee. We will do a Case Study Analysis on the current trust portfolio to ascertain if it is in accordance with your current investment objectives and risk tolerance.

Please send me a copy of the trust along with the most recent statement from the current trustee, and I will forward them for review.

Once reviewed, we can discuss its current investments and whether we can be of service to you.