



The Trust Company

## Transfer an Existing Trust

Review current trust situation with client,  
*including satisfaction with:*

- ✓ Sensitivity of trust officer to personal needs
- ✓ Personnel turnover
- ✓ Face-to-face service
- ✓ Accuracy of Income payments
- ✓ Understandable annual statements
- ✓ Cost
- ✓ Investment performance
- ✓ Use of propriety mutual funds
- ✓ Tax reporting

Counsel the client about a decision:

- ✓ To maintain the current trustee  
**OR**
- ✓ To consider moving the Trust to another trustee and your investment management input

**If the decision is to  
move the trust**

**Provide client and advisor with information about The Trust Company:**

- ✓ They can evaluate the advisor-Trust Company team approach.
- ✓ We suggest referring to the web site and providing our brochure.

Send The Trust Company a copy of the trust document including any and all amendments and the most recent statement of the trust account

**The Trust Company will review the trust and respond to you with options:**

- ✓ If the transfer can be accomplished easily, The Trust Company will provide appropriate draft correspondence materials and coordinate the transfer.
- ✓ If the transfer will be move involved, we will discuss with you what steps to take with your client and the current trustee.

**We stand ready to provide you with the tools and information you need to meet the trust goals of your clients. Contact us today to discuss details at (800) 203-5321 or visit [www.sterneagee.com](http://www.sterneagee.com).**