capital trust

# Creation of New Trust

## Consult with client to identify long-term vision and goals:

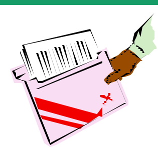
- Consult with advisors on client-centered team to decide which trust type(s) will accomplish the goals.
- Educate your client about Capital Trust

Access Capital Trust's expertise in planning the details of the proposed trust(s)

## The attorney drafts the trust for the client:

- Naming Capital Trust as initial or successor trustee
- Naming trust protector, if appropriate
- Including investment advisor language

*(Attorneys may access form documents and suggested administrative language on the Trust Language pages of [www.ctcdelaware.com](http://www.ctcdelaware.com)*



Capital Trust participates in document review process.

## Finalize trust:

- Advisors meet with client to go over details and execute the trust document.
- Executed document sent to Capital Trust; we execute as trustee, bringing the trust into existence.
- Client transfers assets to the trust.
  - If Capital Trust is the trustee, the assets should be transferred to:
    "The Capital Trust Company of Delaware, Trustee FBO *Name of Trust*".
    *(If CTC is successor, then substitute the initial trustee accordingly. )*

## Advisor and Capital Trust establish the trust investment policy statement:

- The trust investment advisor signs the statement and manages the money in the trust

Capital Trust provides full trust administration

We can provide you with the tools and information you need to meet the trust goals of your clients.

*Help your clients take advantage of the most trust favorable state in the country –*

The First State -- Delaware.

*Contact us today to discuss details at 800-258-6334 or visit www.ctcdelaware.com.*