

Review current trust situation with client, including satisfaction with:

- Sensitivity to personal needs
- Personnel turnover
- Face-to-face service
- Understandable statements
- Cost
- Investment performance
- Use of proprietary mutual funds
- Disruptions from mergers
- Tax reporting



Counsel the client about whether:

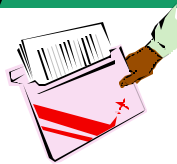
- To maintain the current trustee or
- To move the trust to another trustee with you managing the money

If the decision is to move

Provide client with information about Capital Trust's partnership with advisors :

- Stress your due diligence of Capital Trust.
- Use our materials and website.

With the client's permission, send Capital Trust a copy of the trust document and a recent statement of the trust account.



Capital Trust will review the trust and respond to you with options:

- If the transfer can be accomplished easily, Capital Trust will provide draft correspondence and coordinate the transfer.
- If the transfer will be more involved, we will discuss with you what steps to take with your client and the current trustee.

We stand ready to assist you in meeting the trust goals of your clients.

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