

# Four Steps to Transferring an Existing Trust

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Dunham Trust stands ready to provide you with the resources and knowledge necessary to meet the trust goals of your client. Dunham Trust's job is to help you gather additional client assets and increase revenue.

## Review Existing Trustee with Client:

Are they sensitive to personal needs? Is there high employee turnover?

**Ask about:**

One-on-one service  
Accuracy and timeliness of distributions Comprehensive annual statements 24/7 online access  
Investment results  
Tax reporting

## Counsel the Client About a Decision:

To maintain the current trustee  
Or  
To consider transferring the trust to another trustee  
If the decision is to transfer the trust...

## Provide Client with Information About Dunham Trust:

Review the team approach  
Call your Regional Director or Regional Marketing Associate at (800) 442-4358 to schedule a conference call with a trust officer  
Send Dunham Trust a copy of the trust document and a recent statement of the trust account

## Dunham Trust will Review the Trust and Respond to You:

If the transfer can be easily accomplished, Dunham Trust will provide the proper correspondence and coordinate the transfer  
Or  
If the transfer will be complex, Dunham Trust will discuss the steps to take with you, your client and the current trustee