

Four Steps to Transferring an Existing Trust

For you. For them. For generations to come.

Dunham Trust Company stands ready to provide you with the resources and knowledge necessary to meet the trust goals of your client.

Dunham Trust Company'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 Company:

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 DTC a copy of the trust document and a
recent statement of the trust account

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

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

Dunham Trust Company is a privately held trust company founded in August, 1999. It is licensed and regulated by the State of Nevada, Department of Business and Industry, Financial Institutions Division.

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