

The Advisory Trust Company of Delaware (Advisory Trust) provides directed trustee, trust administration, and back-office services for high-net-worth individuals and families. We work exclusively with professional advisors, assisting them in helping their clients achieve their financial goals by using the full range of trust strategies available under Delaware law.

The Advisor discusses with the client his or her current trustee situation with client, including whether the client is satisfied with the following items:

- Sensitivity of trust officer to personal needs
- Personnel turnover
- Accuracy of income payments
- Understandability of statements
- Cost
- Investment performance
- Use of proprietary mutual funds
- Tax reporting

The Advisor discusses with his or her client about a decision:

- To maintain the current trustee, or
- To consider moving the trust to another trustee and having the advisor manage the assets of the trust.

If the decision is to move the trust to another trustee:

- Provide your client with information about Advisory Trust, including reference to our web site, www.advisorytrustco.com, and provide our brochure.
- Discuss with your client our client-centered team approach.
- Provide Advisory Trust with a copy of the trust document, a recent statement of the trust account and details about the trust.

Advisory Trust will evaluate the information provided and may provide you with:

- Draft correspondence materials if the transfer may be accomplished easily.
- Additional steps if the transfer may be more involved, such as working with an attorney to file any necessary documents with the court.

Once it has been determined that transfer to a successor trustee may be accomplished, the Advisor:

- Provides the documents to Advisory Trust to review for acceptance.
- Works with Advisory Trust to establish an Investment Policy Statement for the Trust.
- Transfers assets to the Trust and registers them as “**The Advisory Trust Company of Delaware, Trustee FBO Name of Trust.**”

Advisory Trust stands ready to provide you with the tools and information you need to meet the trust goals of your clients. Our job is to help you take advantage of one of the most trust favorable states in the nation—The First State—Delaware.

About Advisory Trust

Advisory Trust is part of the Wilmington Trust corporate family, which has been in the wealth management business for 105 years, serving as trustee and advisor for prominent individuals, families, and foundations. Founded in Wilmington, Delaware, in 1903 by T. Coleman du Pont, one of the great industrialists and entrepreneurs in our nation's history, the Wilmington Trust corporate family currently serves wealth advisory clients in all 50 states and 36 countries.

Advisory Trust has offices in Wilmington, Delaware, and Phoenix, Arizona, and currently oversees approximately \$1.3 billion in assets for more than 1,200 personal trust accounts, providing tax and administration services.

ADVISORY TRUST

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