



Getting Started - New Trusts

Getting Started - Existing Trusts

STEP 1 – To get started we will need:

- Trust agreement and any amendments or modifications.
- Sales illustration.
- Original policy (if issued).

STEP 2 – The trust agreement and the insurance policy(s) will be reviewed for acceptance.

STEP 3 – Closing documents needed:

- Signed trust agreement.
- Completed W-9 for all grantors and beneficiaries (foreign nationals: W-8 BEN form and copy of passport).
- Copy of government issued ID or passport for grantors.
- Signed fee schedule by grantors.
- LITC will retain the original trust agreement and insurance policies.

STEP 1 – To get started we will need:

- Trust agreement and any amendments or modifications.
- Current in-force illustration.
- Copy of policy.

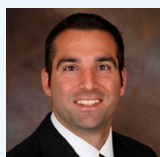
STEP 2 – The trust agreement and the insurance policy(s) will be reviewed for acceptance.

STEP 3 – Closing documents needed:

- Completed W-9 for all grantors and beneficiaries (foreign nationals: W-8 BEN form and copy of passport).
- Copy of government issued ID or passport for grantors.
- Signed fee schedule by grantors.
- LITC will retain the original trust agreement and insurance policies.
- Completed transfer paperwork to transfer the trust LITC.

STEP 4 – The Senior Trust Officer will work with the former trustee to gather general materials needed as successor trustee.

To find out how Life Insurance Trust Company can help you and your clients succeed with your life insurance trusts, contact Tony McKillip.



Tony McKillip

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