



TRANSFERRING AN EXISTING TRUST

Trust Summary			
Trust Title: _____			
Please answer the following questions to give us the best understanding of the trust:			
Are the Settlor(s) Deceased?	Yes	No	
If "Yes", date of death?			
Who is your client(s)?			
What is their role in the trust?			
What is the type of trust?			
What is the approximate market value of trust assets?			
ICON to serve as Current Trustee or Successor Trustee?			
Who is the current trustee?			
Why do they want to remove the current trustee?			
What are the types of assets in the trust?			
Who is the current custodian?			
Do you have a copy of the latest statement? If so, please send a copy to ICON.	Yes	No	
Are there any specific concerns of the client?			
Financial Advisor Tied to the Account (Name & Firm)			
IconTrust Summary - To be filled out by ICON only:			
Appropriate Fee Schedule		Recommendation to Accept Trust?	
ICONTRUST review summary:			