

# BENEFICIARY RIGHTS

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## PAYMENT:

The right to receive distributions in a timely manner and be fully informed regarding distributions which are within the trustee's discretion (i.e. the power to approve additional distributions from principal).

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## ACCESS TO TRUST OFFICER:

The right to be provided with the name and contact information of the trust's dedicated Trust Officer and the right to have concerns addressed in a timely manner.

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## RIGHT TO BE INFORMED:

The right to information regarding the provisions of the trust and that such information should be provided in a manner which is understandable and includes information as to how the beneficiary can enforce their rights under the trust document.

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## RIGHT TO PRIVACY:

The right to expect that, unless otherwise required, all communications with the trustee shall be confidential and private.

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## RIGHT TO RESPECT:

The right to be treated with the utmost dignity and respect without exception and regardless of the issues and circumstances involved.

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## RIGHT TO ACCOUNTING:

The right to receive a periodic statement reflecting all trust activity.

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## REMOVE TRUSTEE:

The right to be provided information regarding the trustee removal process including the rights of current and remainder beneficiaries to petition the appropriate court for the trustee's removal.

*Capital First Trust Company strives for excellence, and the above is a list of goals, not guaranteed rights. Our duties to involved parties may be limited by the terms of the trust agreement or other legal documents in place.*



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