

# 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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IT'S A MATTER OF TRUST