



## Distribution Request Process

The following outlines Capital First's distribution process, which you can refer to when requesting funds. Distributions may require Capital First to liquidate trust assets in the event the trust does not hold enough money market funds to process the request immediately. Requests for large disbursements may require further fiduciary review. Distributions are processed within 7-10 days.

- 1.) **Submit Request** – All requests for distributions must be signed by the Beneficiary (or an authorized representative on behalf of the Beneficiary) and submitted in writing via mail, fax or email to your Trust Officer. You can start a distribution request online by accessing the online distribution request portal here: <https://www.capitalfirsttrust.com/distribution-request>
- 2.) **Trust Document Review** – The Trust Officer will review your trust document to determine whether the request can be approved.
- 3.) **Notify Beneficiary** – The Trust Officer will contact the person requesting the distribution with the decision to approve or deny the request.
- 4.) **Liquidate Assets** – Once approved, the necessary investments may need to be liquidated to make cash available.
- 5.) **Process Payment** – Unless otherwise instructed in writing, the Trust Officer will send a check, via US Mail, to the address we have on record. Checks typically take 2-5 days to receive. Federal Express next-day delivery is available for a \$40 fee. Capital First can also deposit the funds into a checking or savings account via Wire Transfer for a \$30 fee

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