



Several steps in this process may not be within DigitalTrust's control. This estimation is for planning purposes only. The entire process may take 2-8 weeks, depending on Institutions & Assets chosen. This information is for educational purposes only and is not to be construed as financial, legal or tax advice.

What should you expect when moving funds?

- ✓ Contact the resigning custodian to verify its requirements when moving funds.
- ✓ The transfer process may take 1 to 3 business weeks depending on the institution.
- ✓ Almost all resigning custodians require their own paperwork to initiate a rollover of funds.
- ✓ Example Rollover Check titling: Custodian's Name FBO: Client Name & Account Type