



LAND TRUST - PROCEDURES

It is easy to establish a land trust with ATG Trust Company. Just follow these simple procedures.

Should you have any questions, please call Angela McClain, our Land Trust Officer at

312-752-1112 or the main office number 312-338-7878.

Fax: 312-237-4745 Email: ammclain@atgtrust.com

RESERVE A TRUST NUMBER: We will need to know the beneficiary's name.

We will request to know if the property going into the trust is residential or commercial.

- I. **FEES:** We charge a one-time acceptance fee, then an annual trust maintenance fee. Fees for additional services, (e.g. executing documents, etc.) are charged in accordance with the fee schedule in effect at the time the service is requested. As of 2010, there will be a \$50.00 charge to execute documents. Executing a Trustee's Deed is a \$75.00 fee. Closing a trust is an additional \$75.00.

- II. **TRUST AGREEMENT:** We will need a fully completed copy of the Trust Agreement, with original signatures. We will also need a completed copy of the W-9 Tax Identification form and Patriot Act Disclosure for each primary beneficiary and the holder of the power of direction (if different than the beneficiary). We also require a copy of government issued photo identification for each primary beneficiary and person with power of direction. Please provide your client with the attached Customer Identification Program Notice and ATG Privacy Policy notice when they are completing this documentation. You can retrieve these documents from our website atgtrust.com. First click on the Resource Center then click on the Land Trust tab.

- III. **RECORDED DEED IN TRUST:** The Deed in Trust must be recorded in the recorder's office in the county in which the property is located. A copy of the recorded Deed in Trust should be mailed or emailed to: ATG Trust Company, 1 S. Wacker Drive, 24th fl, Chicago, IL 60606 or emailed to Angela at address above.

Thank you for choosing ATG Trust Company as your land trustee.

We look forward to working with you.