

## Independent Trustee Alliance - Character Reference

*ITA Membership, c/o Richard Neely, Treasurer 4925 Greenville Ave., Suite 1400 Dallas, TX 75206-4085*

Dear \_\_\_\_\_,

I have given your name as a character reference so I can be certified by the **Independent Trustee Alliance (ITA)** as a Certified Independent Trustee (CIT, 0-9 years experience) or Master Certified Independent Trustee (MCIT, 10+ years experience). Thank you for mailing this to the address above, as soon as possible, or emailing it to [Info@TrusteeAlliance.com](mailto:Info@TrusteeAlliance.com)

Your reply will be kept confidential and not shared with me, the applicant. I have provided your name, title, email address and phone number to ITA as the membership committee may have further questions. Thank you for your time and support of the application process. Learn more about ITA, please visit: **[www.TrusteeAlliance.com](http://www.TrusteeAlliance.com)**

Applicant Name: \_\_\_\_\_

MEMBERSHIP CATEGORY (please highlight one):

ITA Certified Independent Trustee · ITA Certified Master Trustee

1. What is the applicant's knowledge of Trusts and Trust Administration?
2. Tell us about the reputation and business of the applicant.
3. How do you know the applicant? What is the nature of your work and experience?
4. Please share your comments on the character of the applicant.

\_\_\_\_\_  
Signature of Respondent, Date

Print Name: \_\_\_\_\_ Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Please return this form to the address above within 14 days of receipt, or email to [info@TrusteeAlliance.com](mailto:info@TrusteeAlliance.com) - Thank you!!**