

Independent Trustee Alliance - Character Reference

ITA Membership, c/o Richard Neely, Treasurer, 4925 Greenville Ave., Suite 1400 - (214-578-2662)

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 Certified Master Trustee (CMT, 10+ years experience). Thank you for mailing this to the address above, as soon as possible, or emailing it to 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

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 - Thank you!!