

Message

From: Casriel, Lyle [REDACTED]
Sent: 9/14/2016 9:26:51 PM
To: [REDACTED]
CC: Stackman, Scott [REDACTED]
Subject: MAXWELL: Follow Up

Ghislaine,

This is the feedback we got from our cards group.

If the client is the trustee, he/she can have a card on the account. The card would have his/her name on it. Additional parties can also have cards on the account if they are listed as authorized agents to have a card (these cards would have their names on them). Please note, grantors cannot have cards on trust accounts unless they are added as authorized agents. If the client has more details about who will be listed on the trust, we can ask more specific questions

Let us know if you have more detailed questions.

Best,

Lyle

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