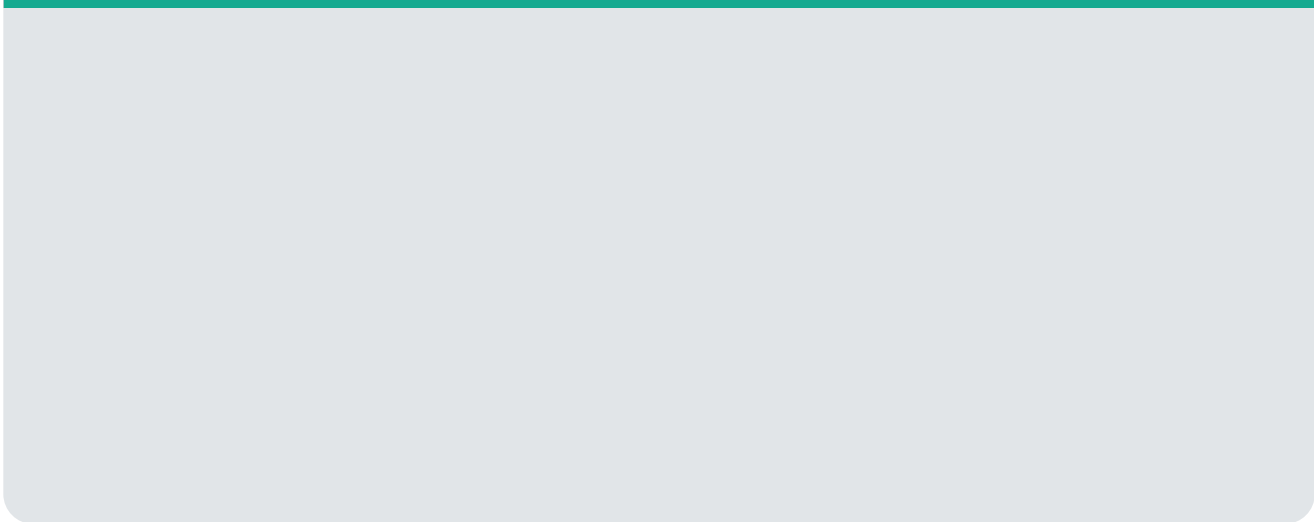




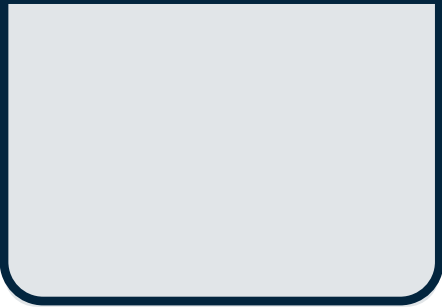
# Trust Referral Process

## Overview

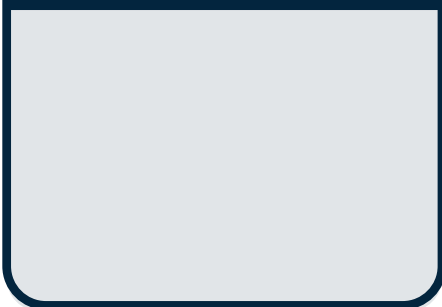


## Stages

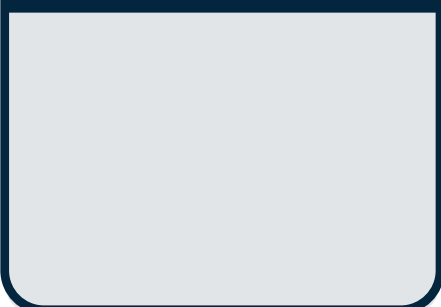
### Stage 1: Packet Submission



### Stage 2: Referral Review



### Stage 3: Transfer Packet Submission



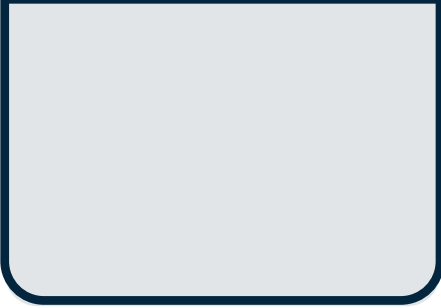
### Stage 4: Account Authorization



### Stage 5: Account Opening



### Stage 6: Asset Transfer





## Stages | A Closer Look

**Stage 1: Packet Submission**

**Stage 2: Referral Review**

**Stage 3: Transfer Packet Submission**

**Stage 4: Account Authorization**

**Stage 5: Account Opening**

**Stage 6: Asset Transfer**