



TRUST SOLUTIONS

IMPORTANT INFORMATION

Dear FSI Client:

We hope that you, your staffs and families are well.

Below is information related to FSI’s operations during the COVID-19 pandemic.

FSI will be here throughout the pandemic to serve you as you serve your clients. We have dispatched most of our staff to work remotely. But, because we are a technology-based company, you can rest assured that we have the technology in place to receive payments, deposit funds to trust and process withdrawals just as though our offices were fully staffed.

Of course, because many of us are working remotely we ask for your patience in the event that we are not able to answer your call or e-mail immediately. You *will* receive a return call and a response as soon as we are able.

Finally, we have been promoting our eCapabilities for years now and today they are even more important for you. Receipt by FSI of payments and receipt by you of trust disbursements via mail is the least efficient method of getting your funds into trust and into your hands. We encourage you to contact our Client Services team now to learn how you can interact with FSI and remain compliant with your state’s laws and rules without the need to visit your mailbox.

Using www.FSItrust.com

The faster, easier way to make deposit and receive funds from trust!

As an FSI client, you have the capability to operate your preneed and perpetual care programs directly from our website without the assistance of an FSI Client Services Representative. Trust withdrawals from trust (money in your bank account) are days faster than manually processing.

	<u>www.FSItrust.com</u> Fastest way to receive trust funds directly into your bank account!	<u>Manual Processing</u> Slowest way to receive trust funds...
Trust Withdrawals Fulfillments, Cancellations and Defaulted Preneed Contracts	<ol style="list-style-type: none"> 1. Log in to www.FSItrust.com 2. Go to <ol style="list-style-type: none"> a. Transactions b. Disbursements c. Submit d. Fill in the contract number <p><i>The money is in your bank account usually by the next business day</i></p>	<ol style="list-style-type: none"> 1. Complete FSI Trust Transmittal Report 2. Mail or fax to FSI 3. FSI processes once received in the mail 4. FSI mails you a check <p>This usually takes a <i>week or more</i>, dependent upon the USPS</p>



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Consumer Payments	<ol style="list-style-type: none">1. Deposit consumer checks to your bank account2. Complete the FSI Transmittal Report on www.FSItrust.com (you've got to do it anyway, right?)3. At YOUR option, FSI will<ol style="list-style-type: none">a. Transfer ONLY the trusted portion of the consumer's payment out of your bank account and deposit to trust, orb. Transfer the entire consumer payment out of your bank account, depositing the trusted portion to trust and the non-trusted portion to your VSP account	<ol style="list-style-type: none">1. Complete FSI Transmittal Report2. Mail Transmittal Report and Consumer checks to FSI3. FSI deposits the trusted portion to trust and the non-trusted portion to you VSP account

If you haven't taken advantage of FSI's webservices, now is the perfect time to contact our Client Services Department (800.749.1340 or clientservices@fsitrust.com) to take advantage of these services.

During these extraordinary times, we wish you the best. Please don't hesitate to contact us if you have any questions.

Sincerely,

Bill Williams, Jr., President/CEO
FSI