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Allowing you to focus on what you do best

How to Go about Choosing a Trustee

In planning for the future, including not just in the context of estate planning but also in planning for current activities and potential disability, trusts are a useful way for clients to ensure organization and control. Central to the successful operation of a trust, though, is the selection of the trustee. Why is the trustee important? Well, the trustee is in the position of administering the trust and making sure the client grantor's intentions and requirements are fulfilled. These items run the gamut from the approach to investing in the trust, the rules for making distributions, working with the beneficiaries paying the bills and overseeing the filing of tax returns and other legal tasks.

For more, contact us at www.mentorriac.com or e-mail us at info@mentorriac.com