



# How to Choose the Right Trustee

## *A Practical Guide for Protecting Your Legacy*

Choosing a trustee is one of the most important decisions in your estate plan. This person (or institution) will be responsible for managing your assets, carrying out your wishes, and supporting your beneficiaries, often during an emotional time.

Here's how to make the right choice:

### **1. Choose Someone You Trust Completely**

Your trustee will have legal control over your assets. Integrity and honesty are non-negotiable.

- ✓ Look for someone with strong moral character
- ✓ Avoid choosing someone simply out of obligation (ie, your oldest child)

### **2. Consider Financial Responsibility**

A trustee doesn't need to be a financial expert, but they should be organized, responsible, and capable of handling money wisely.

- ✓ Pays bills on time
- ✓ Keeps good records
- ✓ Makes thoughtful decisions



### **3. Evaluate Communication Skills**

Your trustee will need to communicate with beneficiaries, attorneys, and possibly the court. They should be:

- ✓ A clear, calm communicator
- ✓ Able to manage conflict
- ✓ Willing to keep beneficiaries informed

### **4. Think About Availability & Longevity**

Trust administration can take months or even years. Consider:

- ✓ Is this person available and willing to serve?
- ✓ Are they likely to outlive you or be able to serve long-term?

### **5. Avoid Potential Conflicts**

Family dynamics can complicate even the best intentions.

- ✓ Consider whether your choice could create tension
- ✓ In some cases, a neutral third party is best

### **6. Consider a Professional Trustee**

If your estate is complex or family relationships are strained, a professional trustee may be the right choice.

- ✓ Find a corporate trustee or a vetted licensed professional fiduciary
- ✓ A professional trustee is objective, experienced, and reliable



## **7. Name a Backup Trustee**

Life is unpredictable. Always name at least one alternate trustee.

- ✓ Ensures continuity
- ✓ Avoids court involvement if your first choice cannot serve

## **Need Help Making the Right Choice?**

At Huber Law Group, we help California families create thoughtful, effective estate plans, so your wishes are honored and your loved ones are protected.

To schedule a no-cost initial consultation, visit our website: [huberlawgroup.com](http://huberlawgroup.com).