

THE CARTER CENTER



The Carter Center Presents: *Ask A Trustee*

With Guests: Jane Hall, Esq. & Ruth Salinger

Hosted By: Barry Nickelsberg, CAP, Chief Development Officer for Estate & Gift Planning
&
Mark N. Williams, Esq., CAP, Senior Associate Director

Thank You

Our work together continues to improve the lives of millions of people, and we cannot thank you enough for your ongoing support.

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Thank You for Your Trust

We would also like to express our gratitude for allowing us to serve as your resource; it is a privilege to be trusted to provide you with information about these important topics.



DISCLAIMER

The information contained in this presentation and these materials are for educational purposes only, and should not be considered financial or legal advice. Any information covered should be discussed with your own estate planning attorney to determine its suitability for your specific situation. The Carter Center is not involved in the practice of law and does not provide legal advice. Mark Williams and Jane Hall are attorneys, but they are not your attorneys and are not providing you with legal advice; no relationship (attorney/client or otherwise) is created by this educational webinar. By viewing this webinar, you agree to the above.



Jane Hall

- Career in trust, estate and tax planning
- Founding Partner, Hall Doyon Group
- Chair, Carter Center Philanthropy Council
- Santa Monica, California



Ruth Salinger

- Career in service as a professional trustee
- Lover of Life
- Teaser of Barry and Mark
- Gloucester, Massachusetts



Ask A Trustee

- Ruth: How and when did you find out you were going to be a Trustee?
- Did you have an opportunity to talk with the person who chose you as Trustee before finding out you were chosen?
- How did their wishes inform or guide your actions as Trustee?



Ask A Trustee

- Jane: How do your clients react when they are going to be/need a trustee?
- Do you suggest that clients talk with the person they choose as trustee before making their plans final?
- How do clients want their wishes to inform or guide the actions of the trustee/themselves?



Ask A Trustee

- Ruth: What was your initial reaction when you learned you would be a trustee?
- Jane: What are some of your clients' initial reactions when they begin to consider who will serve as trustee, particularly when the client is not a trustee? Have trustees shared their reactions with you?



Ask A Trustee

- How would you describe the trust process and your role in it?



Ask A Trustee

- Ruth: What kinds of documents and/or things did you need to do the job?
- Jane: What documents and things do you typically suggest clients provide for Trustees to effectively do the job?



Ask A Trustee

- Jane: Can you tell us more about trustee responsibilities?
- What kinds of things are trustees usually allowed to do/not do according to a trust? Is it possible to change, add or remove trustee powers? The trustee(s)?
- Can a court require you to do or not do certain things as a trustee?



Ask A Trustee

- Ruth: Can you tell us about your responsibilities as trustee?
- What were you allowed to do/not do according to the trust?
- Did a court ever require you to do or not do certain things?



Ask A Trustee

- Ruth: What was the biggest surprise for you as a trustee?
- Jane: What surprises have your clients noted while serving as trustees or when notifying trustees? (Co-trustee, removal?)



Ask A Trustee

- Did you/your clients encounter any disagreements with other trustees, with beneficiaries or anyone else?
 - If so, how were they resolved?



Ask A Trustee

- What advice do you have for people who are preparing their trust and choosing a trustee?



Ask A Trustee

- What advice do you have for people who know they are going to be a trustee?



Ask A Trustee

- **Trusts and Probate: Do you have any thoughts about how people should think about or use a trust in the context of probate?**
- **If you would like more information on Wills and Trusts, and how they can be used, please click below:**
 - **Wills Webinar** (<https://youtu.be/9dE pj 1g LW 1Q>)
 - **Trusts Webinar** (<https://youtu.be/vMQrRlwVkKU>)



Thank You!
Questions?



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