

# When Trusts Go Wrong

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Most people set up a trust to leave a legacy that will live on after they're gone. Often, it's to maintain and grow family wealth across multiple generations or to support a charity. However, things can go awry for various reasons, and all are avoidable.

We should talk if you are concerned about your trust's ability to work as intended. Our Legacy Services team can help you understand if your trust is structured and overseen to maximize your legacy most efficiently.

Trusts require expertise in administration, investment management, and tax law. Because of their complexity and the consequences of error, it can be wise to use a third-party trustee, a professional fiduciary whose sole responsibility and goal is to execute the instructions of the trust instrument.

We are here to provide a second opinion on your trust. This is a normal part of family office services, available without cost or obligation. If you benefit from a consultation, use this link to make an appointment.

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Any trust structuring, document preparation, or related legal services are coordinated through independent third-party professionals. Financial Gravity does not draft trust documents and does not interpret this document as a recommendation for any specific estate planning strategy. This service is offered through and organized by Financial Gravity Legacy Services, LLC, a vendor to FGLS.

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