

The Big 3 When Naming a Trustee

Version: 1.00 | Updated: 07/18/2025 4:39 pm CDT | Published: 07/18/2025

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The Big 3 When Naming a Trustee

To ensure your legacy, you'll want your trustee to provide three essential values: neutrality, expertise, and continuity. Neutrality is needed to provide strict conformance with the trust's objectives, expertise is necessary to ensure the assets are managed and distributed with prudence and care, and continuity is needed to ensure uninterrupted performance.

This is why family offices overwhelmingly seek the services of a third-party trustee. This not only provides these three most important values but also avoids the potential for disharmony and compliance failures that can arise when friends or family members take on the role of trustee.

You took care when you established your trust. If you'd like to discuss what a third-party trustee can offer you, please make an appointment using this link. Our goal is to help you reach your goals. There is no cost or obligation for this service.



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