

Trust Officers, CPAs, and Attorneys – Working together in Trust Market

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Outline

1. Trust Officers
 - a. Language hiccups they've seen
 - b. Direction they want – and don't
2. CPAs
 - a. Numbers are fun
 - b. How other professions can help
3. Attorneys
 - a. Let's avoid litigation
 - b. Communication is key
4. Best practices
 - a. Communicate, communicate, communicate

Degree of difficulty: moderate

This CE is designed to help the various professionals involved in estate planning, and especially in drafting and administering trusts, learn what they can do (and not do) to make their colleague's jobs easier. From drafting language that provides too much or too little direction and when it's advisable to bring the remainder beneficiaries into the loop, this CE will help estate planning professionals understand the roles of their counterparts.