Ryan Groves

Wealth Advisor
Old National Wealth Management
Muncie, Indiana

Ryan is a licensed attorney with more than 10 years of experience in civil litigation. A former partner at a boutique litigation firm, he uses his expertise and insight to help clients recognize issues, address concerns and achieve their goals. He received his bachelor’s degree from Indiana University and law degree from Southern Methodist University. Ryan is the Chairman of the Board for Hillcroft Services and actively involved in several other community nonprofits.

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

Ryan Groves, JD
Wealth Advisor
Old National Wealth Management
Muncie Indiana

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 its advisable to bring the remainder beneficiaries into the loop, this CE will help estate planning professional understand the roles of their counterparts.