

**Sagacious Asset Protection
Trust Education 3
Trustees**

DISCLAIMER

The information shared in this presentation is for information and education purposes only, and must not be taken as personal advice or a recommendation.

Due to the extensive nature of information relating to Trusts what we share in this presentation is an overview and must not be construed as being complete or entire.

It does not take into account your personal circumstances needs, requirements or financial objectives.



Sagacious Asset Protection



Review: The Parties to a Trust

Settlor

Trustees

Beneficiaries

Executive Manager

Protector

Trustees



Selecting Trustees

What sort of person makes a good Trustee?

Trustees



What sort of person makes a good Trustee?

Those who have a Trust.

Trustees



What sort of person makes a good Trustee?

Those whom You Trust.

Trustees



What sort of person makes a good Trustee?

Those who accept responsibility.

Trustees



What sort of person makes a good Trustee?

**Those who understand the requirement
for confidentiality and privacy.**

Trustees



What sort of person makes a good Trustee?

Those who can make decisions for the sole benefit of the Beneficiaries.

Trustees



What sort of person makes a good Trustee?

Those who are prepared to devote some time to gain knowledge and understanding for managing and administering all the affairs and functions of the Trust.

The Premier Trust Trustees



The First Trustee:

Accepts their appointment and in turn appoints the **'Second Trustee'**.

The two Trustees form the **'Board of Trustees'** and are responsible for the management of the Trust for the sole benefit of the **'Beneficiaries'**,

Trustees



The Board of Trustees should consider the Trust as their own Business/Enterprise and manage and administer it accordingly.

The Premier Trust



The Trust Deed Details the Trustee's

Authority

Duty

Powers

In clear concise and easy to understand language.

The Premier Trust



Details the Requirements for

Removing Trustees

Replacing Trustees

The Board of Trustees



May obtain Professional Assistance

Accountants

Wealth Managers

Rental Agencies

The Board of Trustees



Work in harmony with

The Executive Manager

The Beneficiaries

Trustees



In summary what sort of person makes a good Trustee?

- 1. They Have a Trust.**
- 2. You Trust them.**
- 3. They possess a sense of responsibility to their appointment.**
- 4. Understand the requirement for Confidentiality & Privacy.**
- 5. Can make decisions for the sole benefit of the Beneficiaries.**
- 6. Prepared to devote some time to gain knowledge and understanding to manage and administer the Trust.**

Trustees



Paying Trustees