



Questions to Ask Yourself Include:

- What training, credentials and certification does the candidate possess?
- Will the candidate be able to obtain and perform investment management, accounting, tax and bookkeeping services for the trust to fulfill fiduciary responsibilities?
- Does the candidate have a good grasp of your estate plan, goals and objectives?
- Does the candidate have the experience to deal with specialized or unique trust assets?
- Will the candidate adhere to high standards and best protect the trust assets for current and future beneficiaries?
- Will the candidate make objective decisions to administer the trust and treat beneficiaries fairly?
- Will the candidate be able maintain a neutral stance to act impartially between competing interests of various beneficiaries?
- Will the candidate have the time to properly devote to the administration of the trust?
- Will the candidate be able to take quick and efficient action in trust administration?
- Is the candidate sufficiently younger than the trustor to outlive the trustor and fulfill their obligation?
- What measures are in place to ensure the security of sensitive and confidential client information and data?
- What disaster recovery systems are in place should an emergency occur?
- Does the candidate maintain errors and omissions insurance?
- When are fees assessed? How are fees calculated?