

# WHO SHOULD BE IN CHARGE OF YOUR ESTATE?

IF YOU HAVE

ASSETS OF LESS THAN  
**\$1 MILLION**

*consider an*



INDIVIDUAL TRUSTEE

*unless ...*

the trustee needs to have specialized asset management experience.

**Then, consider a**



CORPORATE TRUSTEE

IF YOU HAVE

ASSETS OF MORE THAN  
**\$1 MILLION**

*consider a*



CORPORATE TRUSTEE

*unless ...*

the trustee needs to have:

- A close relationship with the beneficiary, **or**
- Specialized knowledge, as in a family business.

**Then, consider an**



INDIVIDUAL TRUSTEE

**Regardless of the amount of your trust, if:**

- There is no trusted individual
- The available individual would face adverse tax results
- The available individual would have conflicts of interest
- The trust is longer-term, or multi-generational
- The trust is complex and requires additional oversight

*Consider a*



CORPORATE TRUSTEE

Consult with your estate planning attorney



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