





Fiduciary duties over the life cycle of your estate plan

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Event or situation	You are alive and well	You are temporarily or permanently incapacitated	At the time of your death	Your legacy continues
Time span of the fiduciary role	TRUSTEE			
	YOU OR AGENT		EXECUTOR'S AGENT	
Fiduciary function	Advise and implement 	Organize and manage 	Settle estate and distribute assets 	Manage assets and make decisions 
Key duties	<ul style="list-style-type: none"> • Build and monitor plan • Understand trust provisions • Review asset ownership • Secure storage of key documents 	<ul style="list-style-type: none"> • Pay bills • Assess and coordinate care and other needs of beneficiary 	<ul style="list-style-type: none"> • Distribute assets • Coordinate final tax filings • May also mediate any disputes 	<ul style="list-style-type: none"> • Administer trust provisions • Protect assets
Other ongoing duties		<ul style="list-style-type: none"> • Manage assets • Deal with family dynamics • Pay taxes 		

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