



# A TRUSTEE'S FIDUCIARY DUTIES

- 1. Administer the Trust:** Read the trust instrument and follow its terms.
- 2. Loyalty:** Don't place own interests above the beneficiaries'.
- 3. Impartiality:** If two or more beneficiaries, give due regard to everyone's interests.
- 4. Prudent Administration:** Administer as a prudent person would.
- 5. Control, Protection and Delivery:** Control, protect and deliver tangible personal property.
- 6. Record Keeping and Identification of Trust Property:** Keep adequate records and separate trust property from trustee's own property.
- 7. Enforcement and Defense of Claims:** Redress a breach of the trust known to trustee that was committed by former trustee.
- 8. Inform and Report:** Keep qualified beneficiaries informed of material facts necessary to protect their interests.
- 9. Distribution Upon Termination:** When the trust terminates, expeditiously distribute the trust property to those entitled to it.

## CONTACTS



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