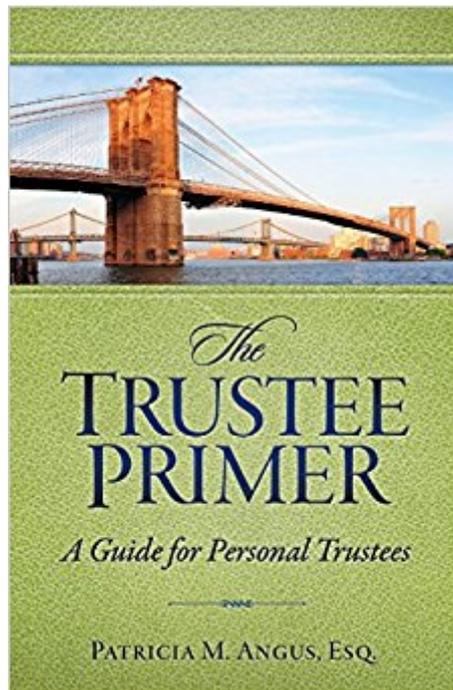


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The Trustee Primer: A Guide For Personal Trustees



Synopsis

An essential guidebook for individuals who have been named as trustee of personal trusts for family members or friends. Written by an expert who has more than two decades experience working with families to create, administer, and benefit from trusts, this primer is a "go to" resource for anyone who has been named as a trustee. The text incorporates a worksheet throughout that can help a trustee organize information, thoughts and questions to best serve as trustee. Key concepts are distilled to their essential elements. The tone is encouraging and easy to read while maintaining a sense of the seriousness, and importance, of the trustee's role. Also helpful for anyone setting up a trust as part of an estate plan or who is already a trust beneficiary.

Book Information

Paperback: 72 pages

Publisher: Angus Advisory Group LLC (December 21, 2015)

Language: English

ISBN-10: 0997068000

ISBN-13: 978-0997068009

Product Dimensions: 5.5 x 0.2 x 8.5 inches

Shipping Weight: 9.6 ounces (View shipping rates and policies)

Average Customer Review: 4.8 out of 5 stars [See all reviews](#) (4 customer reviews)

Best Sellers Rank: #359,369 in Books (See Top 100 in Books) #107 in [Books > Law > Estate Planning > Estates & Trusts](#) #277 in [Books > Law > Tax Law](#) #90443 in [Books > Reference](#)

Customer Reviews

The role of trustee has become too much of a mechanical exercise, to the detriment of beneficiaries. They are more than watching money, they are about operating in a system of families, personal relationships and people growing and finding their way. This monograph offers a broader view, a look at the role in a deeper, fuller sense, as part of a whole system. A lawyer whose work has evolved to make the suggestion that the trustee has to look at the personal, family and societal dimensions of his or her role. The effect of her ideas is to open one's eyes to what one is doing as a trustee and learn and practice in a more engaged way with the various stakeholders who are involved. A must read for those who work in the world of trusts.

Simple, clear, un-intimidating - this is a book I will give to anyone I know who has been asked or is asking someone to be a personal trustee of a trust. It is written for the beginner - the person who

may not even know what a trust is. This approachable book simply reviews the process, duties, risks, and rules of filling that role. It is without bias. Authored by Patricia Angus, Esq., a notable former estate attorney who now both consults with families of wealth and teaches at Columbia University, this book neither encourages nor discourages one from becoming a trustee. Her only purpose is to inform the potential trustee so s/he can decide whether or not to take on the responsibility with his/her eyes wide open.

Cannot recommend this book highly enough! As a trustee and a beneficiary, I know first hand how confusing and opaque, these legal relationships can be. With her clear and concise writing, Ms. Angus demystifies the roles and responsibilities of trustees and beneficiaries. Unlike most books on this subject, she does not forget that these legal relationships are also relationships between people. Really a ten star book!

Anyone considering becoming a trustee should read this primer. It provides an outline of what the job entails and gives tips on how to do the job effectively.

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