



Questions for Your Trustee

1. How long has the trust company been working in Northern Nevada?
2. What distinguishes your trust company from the other trust administration companies?
3. Does your trust company have a local team who can respond to my questions and the changing needs of my trust before and during the administration process?
4. Does your company offer ongoing trust and asset review services beyond initial appointment?
5. Does your trust company work directly with outside professionals to support the services you provide? Do you have attorneys or financial planners on staff?
6. What is your fee schedule for trust administration and trust settlements? How does your fee schedule compare to other companies in the area?
7. Describe your process for administering the trust during my incapacity?
8. Describe your process for administering the trust upon my death?
9. What is your plan for maintaining communication with the beneficiaries?
10. Does your company have expertise in administering special needs trusts?
11. If I need to make changes to my trust, which law firm do you recommend for drafting estate planning documents?
12. Does your company offer comprehensive or family office services for clients?