

Trustee Scorecard®

As a Trustee, are you aware of your fiduciary duties, as well as your personal liability exposure?

Do you know if you are managing Trust assets in compliance with the relevant Prudent Investor requirements?

Are you accounting for Trust transactions in compliance with the relevant Principal and Income Act?

Have you done proper due diligence for discretionary distributions?

Have you adequately addressed all potential conflicts of interest or self-dealing?



Your duties as Trustee are described in relevant trust documents and in applicable State laws. These duties carry significant personal obligations and liability. Fiduciary litigation is very costly and fiduciary duties are broad.

Trustee Scorecard® will assist you in assessing the extent to which you are meeting the requirements of the relevant trust document and applicable State law.

After a thorough review of relevant documents, a Trustee Scorecard report is delivered detailing strengths and weaknesses, and where applicable, recommendations for improvement.

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Trustee Scorecard® is appropriate for Trustees of irrevocable trusts or where the Trustee is a different person or entity than the current or vested remainder beneficiaries.

*Beneficiaries, you can take advantage of **Trustee Scorecard®** to assess the job your Trustee is doing for you.*

***Trustee Scorecard®** can be used to evaluate individual, professional, or corporate Trustees.*



Steve Masterson has over 29 years experience managing a wide variety of trust and estate assets, designing estate plans for high net worth clients, and creating custom financial solutions for unique family circumstances.

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Steve Masterson is not a licensed attorney and does not offer legal advice or representation. The content of the Trustee Scorecard® report is given as information only and should not be construed as legal advice on any subject matter. Questions of a legal nature should be directed to appropriate legal counsel.