

# THE ULTIMATE ESTATE PLANNER'S

# SUCCESSOR TRUSTEE MANUAL

## TABLE OF CONTENTS

Introduction.....	iii
About the Author.....	v
About Kavesh, Minor & Otis, Inc.....	vi
Acknowledgements.....	viii

TAB

Chapter 1: Brief Overview of How a Living Trust Works.....	1
Chapter 2: Before Getting Started: A Few Important “Do’s” & “Don’ts”.....	2
Chapter 3: Checklist of Immediate Actions Upon Disability or Incapacity.....	3
Chapter 4: Checklist of Immediate Actions Upon the Death of the First Spouse.....	4
Chapter 5: Checklist of Immediate Actions Upon the Death of an Individual (Or the Surviving Spouse).....	5
Chapter 6: Reviewing the Trust (And Other Estate Plan Documents) .....	6
Chapter 7: Tips On Working Successfully With an Attorney (And Other Professional Advisors) .....	7
Chapter 8: Tips On Working Successfully With the Beneficiaries.....	8
Chapter 9: Your Trustee Duties.....	9
Chapter 10: Your Trustee Powers .....	10
Chapter 11: Your Liability as Trustee .....	11
Chapter 12: Maintaining Title to Assets, Transacting Business & Paying Expenses ....	12
Chapter 13: Investing Trust Assets.....	13
Chapter 14: Recordkeeping .....	14
Chapter 15: Income Taxes .....	15

FOR REVIEW PURPOSES ONLY—TO PLACE YOUR ORDER, CALL US AT 1.866.754.6477

© Kavesh, Minor & Otis, Inc. & The Ultimate Estate Planner, Inc.

**ULTIMATE**  
ESTATE PLANNER  
UNLOCKING YOUR PRACTICE'S POTENTIAL™

Chapter 16: Estate Taxes.....	16
Chapter 17: Accounting to the Beneficiaries .....	17
Chapter 18: Making Distributions to the Beneficiaries .....	18
Chapter 19: Transition to Another Trustee .....	19
Chapter 20: Termination of the Trust.....	20
Chapter 21: Your (And the Beneficiaries') Own Estate Plan.....	21
Chapter 22: Important Addresses and Phone Numbers .....	22
Chapter 23: Location List .....	23
Chapter 24: Other Documents .....	24

**FOR REVIEW PURPOSES ONLY—TO PLACE YOUR ORDER, CALL US AT 1.866.754.6477**

© Kavesh, Minor & Otis, Inc. & The Ultimate Estate Planner, Inc.

**ULTIMATE**  
ESTATE PLANNER  
UNLOCKING YOUR PRACTICE'S POTENTIAL™