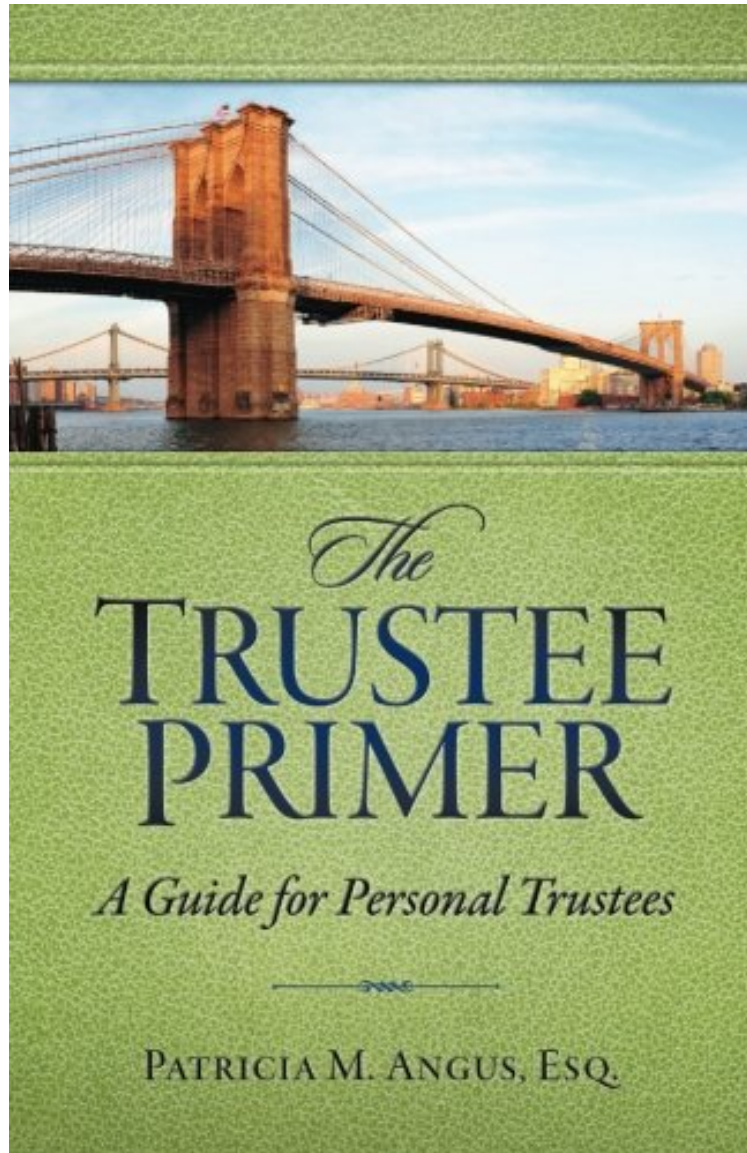


(Download) The Trustee Primer: A Guide for Personal Trustees

The Trustee Primer: A Guide for Personal Trustees

Patricia M. Angus Esq.

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Patricia M. Angus Esq. : The Trustee Primer: A Guide for Personal Trustees before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Trustee Primer: A Guide for Personal Trustees:

2 of 2 people found the following review helpful. Simple, clear, un-intimidating. A must for any prospective trustee. By Myra Salzer 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.² of 2 people found the following review helpful. Cannot recommend this book highly enoughBy upperwestside momCannot 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!0 of 0 people found the following review helpful. Its more than just managing money.By Dennis T. jAFFEThe 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.

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.

"With her trademark wit and breezy style, Patricia Angus breaks down the complicated elements involved in being a trustee ... making this a must-read for anyone acting as trustee or considering becoming one."--Susan R. Lipp, Editor-in-Chief, Trusts Estates