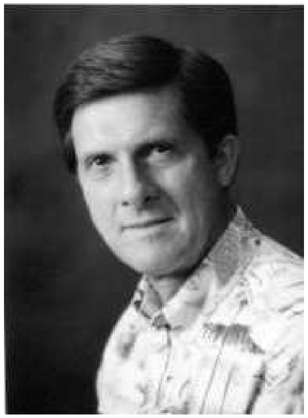
Executor & Trustee *Survival Guide*

Administering an estate or trust can be a daunting responsibility. When you serve as an executor (personal representative) or trustee you are accountable for the financial decisions that you make during the course of administration. **Executor & Trustee *Survival Guide*** will assist you in making these decisions and help you properly manage the estate or trust that is in your care.

Doug Wilson has over 40 years of experience in the estate and trust business and is a Certified Financial Planner (CFP) and Certified Trust and Financial Advisor (CTFA). He has extensive knowledge in all areas of fiduciary management including estate planning, trust and probate administration, charitable trusts, employee benefits, investments, fiduciary and estate taxation, and trust accounting.



Douglas D. Wilson, CFP, CTFA

He is a lecturer at the University of Hawaii's College of Continuing Education where he has authored and taught courses on "Managing Your Affairs After Retirement", "Acting as an Executor or Trustee: Information You need to Know:, and "How to Manage An Estate or Trust."

Doug conducts frequent seminars on estate planning, and trust and estate administration and has written several articles on these subjects including a featured article in the October 1997 issue of the Journal of Accountancy entitled, "Providing Guidance to Executors and Trustees".

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Executor & Trustee *Survival Guide*

- **How to settle an estate and manage a trust**
- **What executors and trustees are required to do**
- **A blueprint for managing the process**
- **Includes illustrations, forms &**

A helpful new book

Fiduciary Publishing

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Executor & Trustee

Survival Guide

To Serve or not To Serve

This section of the book outlines the duties and responsibilities of executors and trustees. It describes the standards of conduct that apply to fiduciaries and how executors and trustees can limit their liability:

- **Serving as a Personal Representative and/or Trustee**
- **Fiduciary Standards and Limiting Liability**

Settling an Estate

Estate settlement procedures are described in some detail. Checklists and a planning outline are also included to provide the personal representative (i.e., executor) with a logical roadmap through the process:

- **How Property Passes at Death**
- **Estate Transfer Procedures**
- **Preparing for the Administration of the Estate**
- **Assembling and Protecting Estate Assets**
- **Administering the Estate**

Managing Trusts

This section outlines the duties and responsibilities of a trustee. It describes how trusts should be managed and provides detailed guidelines on all aspects of trust administration:

- **Trustee Responsibilities**
- **Preparing the Trust for Administration**
- **Funding the Marital, Credit Shelter and Generation-Skipping Trusts**
- **Managing Trust Investments**
- **Managing Real Estate Assets**
- **Managing Business Interests**
- **Making Discretionary Distributions to Beneficiaries**
- **Maintaining Accounting Records**
- **Fiduciary Income Taxes and Other Filing Requirements**
- **Termination of the Trust and Final Distribution of the Assets**
- **Managing Other Types of Irrevocable Trusts**
- **Trustee's Fees**

Getting Help

Personal Representatives (i.e., executors) and trustees will need professional help with some of the more complex estate and trust administration issues. Choosing a competent attorney, accountant or other professional requires asking the right questions. This section describes when and how to select advisors:

- **Where to Get Help**
- **How to Select Advisors**

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