

SEMINAR

Understanding & Communicating Beneficiary Roles

Setting expectations and guiding beneficiaries

One of the most difficult tasks for the Trustee or Personal Representative can be communicating with the beneficiaries and setting expectations about the estate administration process. This can be especially hard if your fiduciary has never acted in this role before. Learn what information you should be communicating to your beneficiaries and how to guide your clients in their fiduciary roles.

Agenda

- Trust Roles: Grantor, Trustee and Beneficiary
- Communication with Beneficiaries
- Keeping the Beneficiaries Informed
 - Interest in the trust
 - Trust details
 - Trustee compensation
- What to Expect as a Beneficiary
- Accounting to Beneficiaries
- Dealing with Difficult Beneficiaries

Speaker



SHANI REA COLLYMORE has been practicing in the field of estate planning and elder law since 2009. She practices at the firm of Cody, Cody & McCarthy LLC in Quincy where she assists clients with all of their estate planning, trust and estate administration and elder law needs. Shani has a decade of experience advising individuals and families on how to protect their wealth and plan for their financial futures. Her practice ranges from creating estate plans for young couples with minor children who need trusts and guardians set up to protect their children, to more complex estate plans aimed at protecting assets from long term care expenses or reducing estate taxes and asset protection.

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 17, 2022
9:30 am–10:30 am
Program Number: 2220130WBC

REBROADCAST

Wednesday, June 1, 2022
12:00 noon–1:00 pm
Program Number: 2220130RBC

REBROADCAST

Thursday, June 9, 2022
4:00 pm–5:00 pm
Program Number: 2220130RB1

ON DEMAND WEBCAST

View after Thursday, June 9, 2022
Program Number: 2220130WBA

Tuition *(includes written materials)*

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