

Choosing a Trustee: Navigating the Complexities and Key Considerations

July 14, 2025

By Herbert R. Fineburg, Danielle Friedman and Charles "Max" A. McCauley, III

In this episode of 'Trust Us,' Danielle Friedman, Max McCauley, and Herb Fineburg discuss the critical aspects of selecting a trustee. They cover common client questions, including who should be named as a trustee, the benefits and drawbacks of having a corporate versus an individual trustee, and the specific limitations and responsibilities of beneficiary trustees. The discussion also delves into scenarios where independent trustees may be beneficial, trustee compensation, and the process for naming successor trustees. The episode aims to provide a comprehensive overview to help clients make informed decisions in their estate planning.

If you are interested in learning more or have any questions, please feel free to contact Danielle at danielle.friedman@offitkurman.com, Herb at hfineburg@offitkurman.com, and Max at cmccauley@offitkurman.com.