

# Complex Trust Management Situations

By Richard H. Lambie

A lot of what we do is deal with complex trust management situations. When I get involved as a trustee it is very often connected with disputes between the beneficiaries. My office becomes the neutral for all of the different family members with different agendas.

Throughout the transaction, if there is a court case going on, if the assets are in disarray, there is no communication between the family members, my office can be the independent party. We gather the records, make sure the assets are dealt with fairly and cleanly, and at the end of the day, after mom and dad are taken care of, the children get their exact share as it's specified in the document.

A document is only as good as the manager named in the document. You should seriously consider:

- Who is named in the document?
- What levels of dispute may arise between the different beneficiaries?

The focus should on the right person for the job.

Disputes between beneficiaries can be extraordinarily expensive in terms of court time, attorney time, as well as the emotional disruption between the beneficiaries.

The solution to that? Bring in a neutral trustee.

Call my office so we can discuss how best to set that up.

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