

WHO SHOULD BE IN CHARGE OF YOUR ESTATE?

WELLS
FARGO

IF YOU HAVE

ASSETS OF LESS THAN
\$1 MILLION

Consider an



INDIVIDUAL TRUSTEE

Unless...

The trustee must have specialized asset management experience,
then consider a



CORPORATE TRUSTEE

IF YOU HAVE

ASSETS OF MORE THAN
\$1 MILLION

Consider a



CORPORATE TRUSTEE

Unless...

The trustee must have:
• A close relationship with the beneficiary, or
• Specialized knowledge, as in a family business
Then consider an



INDIVIDUAL TRUSTEE

Regardless of the amount of your trust, if:

- There is no trusted individual
- The available individual would face adverse tax results
- The available individual would have conflicts of interest
- The trust is longer-term, or multi-generational
- The trust is complex and requires additional oversight

Consider a



CORPORATE TRUSTEE

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May Lose Value

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