



Some Items for Discussion

1. Brief Overview of the family's estate plan
2. Brief history and overview of Zia Trust
3. Assets under administration
4. Trust Officers- qualifications, number, etc.
5. Stability of Trust Officers and Zia Trust as Corporate Trustee
6. Approach to trust Administration
 - a. Initial steps with your family
 - b. Assignment of trust officer and any future change
 - c. Process of trust decision making and timing
 - d. Back office support, bookkeeping, etc.
 - e. Communications with trust beneficiaries
 - f. Trustee duty and Trust Code
 - g. Relationship with trust advisors
 - h. Relationship with financial Advisor- delegated trust responsibilities
 - i. Relationship with family advisors/professionals –CPA, Attorney
 - j. Trustee fees
 - k. Other items as appropriate
7. Replacing the trustee