



### **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. Replacing the trustee
7. 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