



## HOW TO SELECT A PROFESSIONAL FIDUCIARY

*A guide to choosing the right person to protect your estate, health, and legacy.*

### What Is a Professional Fiduciary?

A professional fiduciary is someone who manages your financial affairs or personal care when you can't. In California, they are licensed and held to a high legal and ethical standard. You might name a professional fiduciary in your estate plan as your trustee, power of attorney agent, or healthcare decision-maker.

### Why Consider One?

- ✓ You don't have close family or trusted friends nearby
- ✓ You're concerned about family conflict
- ✓ You want someone experienced in handling complex finances or caregiving needs
- ✓ You value neutrality, privacy, and professionalism

### Top Qualities of a Good Professional Fiduciary:

- ✓ Licensed & Bonded in California
- ✓ Transparent & Communicative: Explains decisions clearly
- ✓ Detail-Oriented & Organized: Keeps excellent records
- ✓ Familiar with Your Needs: Financial, healthcare, or special needs
- ✓ No Conflicts of Interest: Puts your interests first

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## Red Flags to Avoid:

- ❌ Vague or evasive answers to questions
- ❌ Disciplinary history or no license
- ❌ Pressures you to sign quickly
- ❌ Refuses to provide references or lacks positive references
- ❌ Doesn't return calls or emails promptly

## How to Interview a Potential Fiduciary:

- Ask how they've handled past client situations
- Request a list of services and fees in writing
- Check their license status at [fiduciary.ca.gov](https://fiduciary.ca.gov)
- Trust your instincts; if something feels off, it probably is
- See our full Professional Fiduciary Interview Checklist

## We're Here to Help!

At Goff Legal, we help clients evaluate whether a professional fiduciary is the right fit for their personal estate planning needs. We can refer you to reputable, local professional fiduciaries we trust. Feel free to contact us if you have any questions or need assistance!

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