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WE HELP DEAD PEOPLE AND FUTURE DEAD PEOPLE™

PROFESSIONAL FIDUCIARY INTERVIEW CHECKLIST

Use this checklist when interviewing a professional fiduciary to ensure they're the right fit for your estate, finances, and future.

Credentials & Background:

□ Are they licensed in California through the Professional Fiduciaries Bureau?
□ Is their license in good standing with no disciplinary actions?
□ Are they bonded and insured?
□ Do they have relevant certifications (e.g., CFP, CPA, CLPF)?
□ How many years have they been practicing as a fiduciary?

Communication & Accessibility:

□ How often do they communicate with clients or beneficiaries?
□ Can they be reached by phone and email in a timely manner?
□ Do they have a team or backup in case of emergencies?
□ Are they transparent about decisions and documentation?

PROFESSIONAL FIDUCIARY CHECKLIST (CONTINUED)

Experience & Services:

□ Have they served as a trustee, power of attorney, or healthcare agent before?
□ Do they have experience managing estates or trusts similar in size/complexity to yours?
□ How many active cases do they currently have?
□ Are they familiar with the specific services you're seeking (i.e., managing a special needs trust, finances, healthcare decisions, etc.)?
□ Do they provide regular reporting/accounting?
□ Will they coordinate with your estate planning attorney, CPA, and/or financial advisor?
□ What are their total assets under management?
□ Do the have a business succession plan?

Fees & Contracts:

□ Do they clearly explain how they charge (hourly, flat fee, percentage)?
□ Do they provide a written fee schedule or service agreement?
□ Are there any setup, termination, or ongoing maintenance fees?
□ Do they charge for travel, calls, or file reviews?

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PROFESSIONAL FIDUCIARY CHECKLIST (CONTINUED)

Red Flag Check:

□ Do they hesitate to provide references?
□ Are they vague about how they manage conflicts of interest?
□ Do they pressure you to make quick decisions?
□ Do they avoid giving clear, direct answers?

Final Notes & Impressions:

- How did you feel about the meeting? Trust your instincts.
- Would you feel comfortable with this person making decisions on your behalf?
- Did they seem compassionate, professional, and well-organized?

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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