



WE HELP DEAD PEOPLE AND
FUTURE DEAD PEOPLE®

CHOOSING THE RIGHT ESTATE PLAN AGENT

*A quick guide to the questions you should ask before
naming a trustee, executor, or power of attorney*

When you create an estate plan, you're entrusting someone with important responsibilities. The person you choose as your estate plan agent will manage your finances, make healthcare decisions, or administer your trust after your death. Choosing wisely and having a conversation up front can prevent family conflict, mistakes, and stress later.

Top Questions to Ask a Potential Estate Plan Agent

1. Are you comfortable taking on this role?

Willingness is key—don't pressure anyone into the role.

2. Do you understand the responsibilities involved?

Managing assets, paying bills, filing taxes, and distributing property can be complex.

3. Do you have the time and availability?

Trust and estate administration can take months or even years.

4. How do you handle conflict?

Your agent may need to manage disagreements among beneficiaries.

5. Are you comfortable with finances and paperwork?

Attention to detail is critical.



6. Would you work with professional advisors?

Good agents know when to ask attorneys, CPAs, and financial advisors for guidance.

7. Are you local (or available when needed)?

Proximity makes things easier, though remote options exist.

8. Would you be comfortable making medical decisions?

Your healthcare agent must honor your wishes, even under pressure.

9. How would you handle communication with beneficiaries?

Transparency helps prevent disputes.

10. Do you understand you can decline or step aside later?

It's okay to say no if circumstances change.

11. Would you like an overview of my estate plan?

Clarity upfront avoids confusion later.

Next Step: Talk to an Experienced Attorney

Choosing an agent is just one step in building a strong estate plan. At Goff Legal, we guide clients in Roseville and across California in making optimal choices and creating plans that bring peace of mind.

👉 Schedule your free discovery call today! Contact Goff Legal at (916) 625-6556 or at gofflegal.com.

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