MANAGING OTHER PEOPLE’S MONEY

I’M Legally Responsible: Now What!
OSHER Life Long Learning Institute

February 5, 2013

I. Fiduciary

II. Video: Have You Been Asked to Act as a Trustee?
Duties Owed by Trustees to Trust Beneficiaries

III. Trusts

IV. Revocable v Irrevocable Trusts

V. Specific Duties of Trustee

VI. Case Scenario: Who’s Smarter