



## Duties of a Trustee - Online

Designed for banking professionals seeking to service the high net-worth market, this course explains the specific characteristics of trusts and the objectives that trusts can accomplish for high-net-worth individuals. It also explores the various types of trusts and their particular applications, concluding with the duties of a trustee.

This course replicates the content from lesson 5 of Overview of Trusts - Online

This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

### Available Session(s):

Available Today

Online

USD \$60.00

Online

Instructor(s):[]

### Targeted Audience

banking professionals seeking to service the high net-worth market

### Advance Preparation

No advance preparation required.

### Learning Objectives

Students will be able to:

- Identify the duties of a trustee
- Compare the Prudent Man Rule to the Prudent Investor Rule
- Contrast traits of formal versus informal trust settlement
- Identify events precipitating trust accountings

**Level:** Basic

**CPE Credits:** 1

**Instructional Method:** Self-Study

## **Detailed Outline**

### **Duties of a Trustee**

- Duties and responsibilities of the trustee
- Trustee investments
- The Prudent Man Rule versus the Prudent Investor Rule
- Trust accountings
- Formal and informal settlements
- Events precipitating accountings

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.