

# TRUST QUESTIONS

A trust document is the “blueprint” that states the intent of the person establishing the trust. It is also the document to which the trustee can turn for instructions. Creating a trust takes a significant amount of forethought to ensure the document clearly states the wishes of the person establishing the trust. At Cumberland Trust, we are experienced in helping our clients think through all of the potential issues related to the subject matter of the trust and how the language of the trust will be interpreted and implemented.

**BENEFICIARIES:** Our experienced professionals will help your clients determine who will benefit from the trust. Once the beneficiaries are determined, consider whether there are any special circumstances. Is someone disabled? Are there heirs who are not mature enough to handle money?

**DISSOLVING THE TRUST:** Every trust should have an ending, no matter how far in the future that might be. Our experienced professionals will help your client determine under what circumstances the trust would be dissolved and who—or what entity—would benefit from the assets that remain in the trust when it is dissolved. A trust’s dissolution can be a date, such as 50 years from its inception, or an event, such as the death of the last surviving beneficiary. At that point, who receives the remainder of the trust? If that’s a charity, what happens if the charity is no longer in existence?

We’re happy to meet with you and your clients to discuss the need for a trust. We work closely with you, your client and the client’s attorney to ensure that a properly drafted document is created.

To learn more about Cumberland Trust’s unique platform, visit [cumberlandtrust.com](http://cumberlandtrust.com).



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