



Purpose

The purpose of Successor Fiduciary Appointment Planning engagements, including the estate plan review and memorandum, is for (1) the Client and Lindsay come to mutually agreeable terms under which Lindsay may agree to serve, in the future; (2) to provide Lindsay the opportunity to understand and document your wishes, planning and circumstances and (3) to provide general coordination of fiduciary services as applicable and needed.



Disclaimer

Engagement of Lindsay/Santa Barbara Fiduciary for Successor Fiduciary Appointment Planning services is not a formal acceptance to serve in the future. Lindsay may elect not to accept such an appointment and bears no inferred obligation to do so.



Call to Serve

Lindsay's decision to either accept or decline an appointment is made at the time that the appointing documents call her to serve, for example, when an individual is either unwilling or unable to serve, by means of incapacity or death.

SUCCESSOR FIDUCIARY APPOINTMENT PLANNING ENGAGEMENTS

IMPORTANT INFORMATION



Formal Acceptance Decision

When called upon to serve Lindsay, considers (1) whether Client implements significant subsequent revisions to estate plan documents that pose restrictions to or difficulties with Lindsay's ability to effectively serve, (2) client maintaining up-to-date estate planning documents and (3) client affording Lindsay the opportunity to monitor client's plan and goals, with periodic follow-ups.



SANTA BARBARA FIDUCIARY

805.308.6842



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Santa Barbara, CA 93108

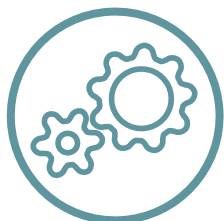


SantaBarbaraFiduciary.com



Policies & Practices

Our primary fiduciary duty is the management and care of property and personal affairs for others. With these responsibilities come risk, and our ability to monitor and control these risks, via adherence to internal policies, practices and controls, is of paramount importance. We insist that clients have a willingness to trust and work within the processes that we've found best serve their interests.



Work Principles

We expect our clients to have key shared values that maintain our culture meaningful work and meaningful relationships. We insist that the people we work with are considerate, appreciate and value our services.

