



City National Bank Estate Settlement Services

TRUSTS & ESTATES

Your legacy is too important to leave to chance. When the unspeakable happens, those you leave behind will have to act fast to satisfy state and federal law and preserve the value of your estate. Your choice of an executor, including a successor trustee in the case of your trust estate, is one of the most important decisions you will make when preparing your estate plan.

WHAT TO LOOK FOR IN AN EXECUTOR

Technical Expertise

Executor incompetency is the single largest reason an estate's value is diminished or lost. Your executor should be competent and understanding, strictly adhering to your plan and the requirements of the law. And an executor must be available to serve. Even the most competent individuals may not have the time or desire to dedicate their efforts to this very difficult, often very time-consuming task.

Objectivity

An executor is required by law to be impartial, whereas a family member or close family friend may be influenced by emotions or complex family dynamics. A third-party fiduciary will administer your estate without prejudice or emotion.

Fiduciary Responsibility

Executors are personally liable for their actions as a fiduciary. In the event of any legal action based on their actions, your choice of executor will subject themselves to legal expenses and recovery by an aggrieved beneficiary.

GETTING STARTED

City National Bank's Trust and Estate Administration professionals work with your family and advisors to handle the complex legal, tax and administrative burdens involved in the wealth transfer process, including:

- Asset identification, collection, valuation and management
- Probate estate and trust administration
- Filing of estate tax returns
- Preparation of all required inventories and accountings
- Distribution of assets in accordance with the estate plan

Speak to your Relationship Manager to learn how we can administer your estate plan, including your trusts, with the highest level of care and sophistication so the legacy you envision is fulfilled.

Important Disclosures

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Professional trustee services are offered to City National Rochdale clients by City National Bank which may serve as trustee.

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