**Successor Trustee Conversation Checklist**

**1. Before the Conversation (Pre-Meeting Prep)**

* **Identify if the client has a Will, Revocable, or Irrevocable Trust**
* **Know the trust’s current successor trustee (if any)**
* **Confirm whether governing law or situs is set**
* **Understand the client’s family dynamics (any potential conflict?)**
* **Estimate client’s total net worth (under $2M, $2M–$10M, $10M+)**
* **Prepare a sample trustee role overview document (non-legal)**

**🔹 2. Initiating the Conversation**

* **Use a soft entry:  
  *“We’ve done great work together on the plan. Have you also thought about who would take over if something happened to you?”***
* **Ask about their goals:  
  *“Is continuity important to you in how your wealth is handled and passed on?”***
* **Ask if they’ve discussed this with their estate planning attorney**
* **Frame the conversation as protecting their intent and their family’s future**

**🔹 3. Key Talking Points to Hit (Not Legal Advice)**

* **Difference between a trustee and executor**
* **What a successor trustee does and why it matters**
* **How trust administration works after death**
* **Why clients often unintentionally disinherit their advisor when they don’t name a collaborative trustee**
* **Introduce the friend/family/co-trustee/corporate trustee framework by net worth tier**

**🔹 4. Offer Support Options**

* **Suggest a collaborative trustee (e.g. Wealth Advisors Trust Company)**
* **Offer to be on a joint call with their estate planning attorney**
* **Share the follow-up toolkit link with deeper scripts, videos, and downloads**

**🔹 5. After the Conversation**

* **Summarize client goals in writing (keep on file)**
* **Provide a recap email or shared takeaway**
* **Follow up within 2 weeks with additional resources or an attorney introduction**