

## Important points to consider when choosing a trustee...

Choosing a trustee is not a task to be taken lightly and is a process which should be carefully thought out. Remember, these people will be responsible for distributing the proceeds of your insurance policies, effectively ensuring the welfare of your loved ones.

The key is in the name: **trustee**

We recommend drawing up a shortlist of 4 potential trustees with a view to reducing this to 2 - 3 following further discussion. To help you make these crucial decisions and kick start the process, we thought you might appreciate a list of factors to consider when deciding on your candidates:

**Age:** - Your trustees should be as close to your age as possible.

**Financial Situation:** - A good trustee should be financially stable and competent. It is important for them to be comfortable handling sizeable sums of money. It may also be an idea to consider trustees with similar family demographics to ensure a greater understanding of your personal circumstances.

**Location:** - Ideally, your trustees should live close by. It's essential that they are within close range should the worst happen.

**Mindset:** - The level of responsibility associated with being a trustee should not be underestimated. Your trustees should fully understand their role and be completely dependable.

**Health:** - Your trustees should be in good health to ensure they are fit and well enough to manage your plan proceeds.

Name	Date of Birth	Relationship	Telephone	Email	Address