

Checklist for Finding Good Trust Admin Services for an Irrevocable Non-Grantor Dynasty Trust

Comprehensive Checklist for Finding Trust Administration Services

General Information

Questions to Ask the Trust Administration Service

General Qualifications

1. Have you worked with irrevocable, non-grantor dynasty trusts before?
2. Are you familiar with vortex private trust structures?
3. Do you specialize in trust administration and asset protection?
4. How many years of experience do you have in trust management?
5. What training or certifications do your administrators hold?
6. Are you familiar with managing multiple types of trusts, including pet trusts, gun trusts, special needs trusts, and ecclesiastical private dynasty trusts?

Services Offered

1. What specific trust administration services do you provide (e.g., bookkeeping, compliance, asset management)?
2. Do you assist with trustee obligations, record-keeping, and IRS filings?
3. Can you customize your services to align with my trust's unique requirements?
4. Do you provide guidance on state-specific compliance for pet trusts and gun trusts?
5. How do you handle special needs trusts to ensure compliance with government benefit programs?
6. Are you equipped to manage the unique spiritual or religious requirements of ecclesiastical trusts?
7. Can you assist with distributions and beneficiary communications for all types of trusts?
8. Do you provide legal or compliance support for trusts?
9. Do you have experience managing asset protection strategies for vortex private dynasty trusts?

Tax Strategy and Compliance

1. Are you familiar with IRS filing requirements for irrevocable trusts (e.g., Form 1041)?
2. How do you ensure compliance with federal and state regulations across different trust types?
3. Do you provide advice on tax strategies or work with tax professionals?
4. How do you handle audits or inquiries from tax authorities?
5. Are you experienced with the tax implications of special needs trusts and ecclesiastical trusts?

Fee Structure

1. What is your fee structure, and are there additional costs?
2. Do you offer a flat rate or hourly pricing for trust administration?
3. Are there any hidden fees or charges I should know about?
4. Do you provide detailed invoices or reports of fees?

Reputation and Trustworthiness

1. Can you provide references from clients with similar trust structures?
2. Have you worked with other private, family, or dynasty trusts?
3. Are you a member of professional organizations (e.g., NAEPC, AICPA)?
4. Can you share case studies or examples of how you've supported other trusts?
5. Have you successfully managed pet, gun, or special needs trusts in the past?
6. Do you have experience with ecclesiastical trust structures and their unique requirements?

Communication and Compatibility

1. How do you typically communicate with clients (e.g., email, phone, in-person)?
2. How responsive are you to questions or concerns?
3. Do you provide regular reports or updates on the trust's status?
4. Are you open to a free or low-cost consultation?
5. How do you ensure transparency in decision-making and communications?

General Qualifications and Experience

Reputation and Trustworthiness	.
Tax Strategy and Compliance	
Fee Structure and Services	
Communication and Compatibility	.
Red Flags to Avoid	Red Flags to Avoid 1. Lack of experience with complex trusts or private structures. 2. Vague or overly complex fee structures. 3. Refusal to provide client references or examples of past work. 4. Pushy upselling of unrelated services (e.g., insurance or investments). 5. Poor communication or lack of responsiveness. 6. No professional affiliations or memberships. 7. History of negative reviews or unresolved complaints. 8. Lack of experience with specific trusts (e.g., pet, gun, special needs, or ecclesiastical trusts). 9. Inability to explain how they would handle unique compliance or asset protection requirements.
Additional Notes	

Additional Notes

Use this comprehensive checklist to evaluate and compare trust administration service providers, ensuring they are equipped to handle the unique needs of all your trust types, including pet, gun, special needs, vortex private dynasty, and ecclesiastical private dynasty trusts.

Conclusion

