WINSTEAD

Administering A Trust In a Recession: Issues Surrounding Trust Loans To Beneficiaries

04.21.20

This presentation will address beneficiaries requesting loans from trustees. There are multiple issues that arise regarding the trustee's authority to do so under the trust's language and statutory and common law, and the loan's impact on duties of loyalty, confidentiality, impartiality, and proper management of a trust's assets.The presentation will also cover due diligence and other practical considerations in documenting the loan as well as alternatives to decrease a trustee's risk when facing these types of lending transactions.

Date: Tuesday, April 21, 2020
Time: 10:00 - 10:45 a.m. Central Time
Cost: Complimentary
Speaker: **David F. Johnson**

Continuing Education Credit Information:
Accreditation of this activity by the MCLE Committee of the State Bar of Texas is pending

Who should attend:
In-house counsel and other litigation contacts, trust officers, risk management contacts, and wealth advisors