



# **Your Trustee Duties: How to Dissect a Trust Contract, Prepare Form 1041, Distribute Income and Principal to Beneficiaries, and Terminate the Trust (Series 300: Retirees & Estates)**

*Holmes F. Crouch*

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The obligations and responsibilities of trustees are laid out in this guide to working with attorneys, understanding tax procedures, and real-life examples. From completing a 1041 form to determining which financial records to pay particular attention to, this primer offers tips for every step of being a conscientious trustee. Instructions for closely reviewing a contract, taking inventory of the sources of trust income, and terminating a trust are also included.

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