Join Elville and Associates, principal Stephen R. Elville, and our hosts Baltimore-Washington Financial Advisors, as we invite you to an interactive lunch workshop on, "Trustee Selection- How to Choose the Right One for You."

TOPICS WILL INCLUDE:  
• What is a Trustee and what are their responsibilities?  
• Types of trustees and their characteristics- advantages an disadvantages  
• The perfect Trustee- setting the benchmark for selection  
• Trustee selection- why is it so important?  
• Trustee succession and plan design- why so difficult, why so crucial?  
• Trustee roles in Wills and Trusts  
• What are some reasons to consider appointing a corporate trustee?  
• Why should you be concerned about "successor trustee risk"?  
• How can BWFA help with selecting a corporate trustee?

Please RSVP to BWFA's Client Relations Manager, Eve Kennedy, at 410-461-3900, or ekennedy@bwfa.com, or Jeff Stauffer, Elville and Associates' Community Relations Director, at 443-676-9691, or jeff@elvilleassociates.com. We look forward to seeing you there!