astra fiduciary services

# Looking to Change Your Corporate Trustee?

## How to make the right choice for your family trust

Over time, the needs of a family trust are bound to evolve — whether it's due to new beneficiaries being added into the mix, the performance of financial markets, or a trustee no longer adequately serving a family.

Though it can be daunting to consider switching your trustee, it doesn't have to be. At Astra Fiduciary, we seek to provide seamless guidance and high-touch support for clients during any transition. We make things simple and efficient, so that your family trust is set up for success in perpetuity.

## When replacing a trustee makes sense

It's a scenario that plays out again and again: Beneficiaries inherit a trustee who was chosen by the previous generation but lacks a relationship with the current one. This can lead to family members losing confidence in the trustee, especially when there is little or no communication past the notifications about distributions.

### If you're thinking your current trustee isn't the right fit, it's important to consider the following criteria:

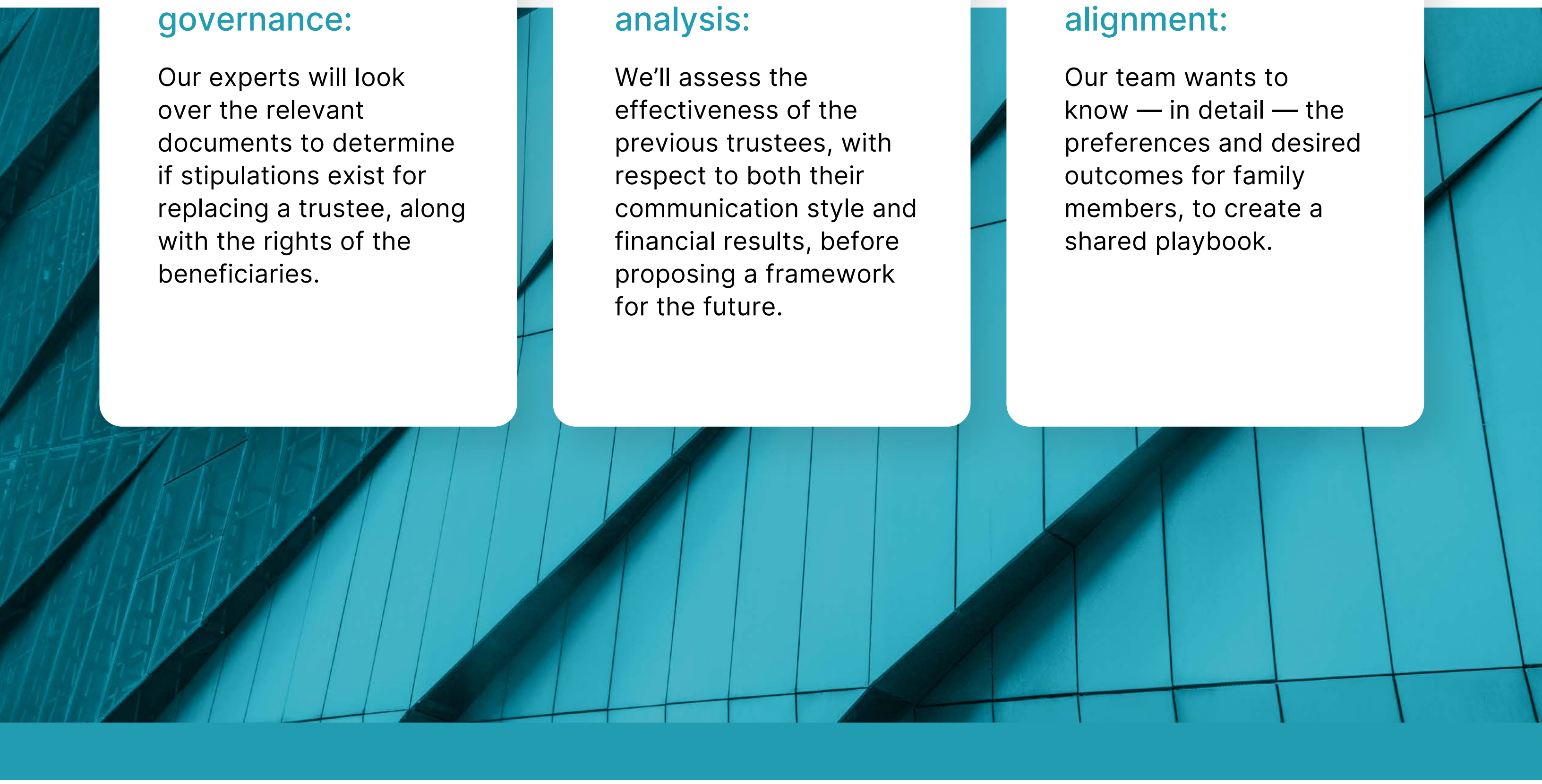
- **Attentiveness**
  Are they slow to respond to your outreach?
- **Open-Mindedness**
  Are they rigid in their administrative or investment approaches? Are they resistant to embracing new ideas or innovations in the industry?
- **Consistency**
  Has there been a lot of turnover at the corporation in charge of your trust, and has that produced inconsistent relationships?
- **Costs**
  Did fees increase without sufficient explanation?
- **Emotions**
  Is there a misalignment between the trustee's personality and your current family dynamics?

If the answer is ***Yes*** to one or several of these questions, then it may be time to consider a replacement.

# Finding the right tustee for you

Families often encounter situations where a corporate trustee no longer meets their needs — whether due to poor service, a lack of personalization, high fees, or simply a desire for a more responsive fiduciary partner. However, what often holds them back from making the change is the fear of dealing with legal and administrative hurdles in replacing a trustee.

Astra strives to simplify the process, explaining each step in plain language and coordinating with attorneys and advisors to ensure efficiency throughout, including:



### Review of trust governance:

Our experts will look over the relevant documents to determine if stipulations exist for replacing a trustee, along with the rights of the beneficiaries.

### Performance analysis:

We'll assess the effectiveness of the previous trustees, with respect to both their communication style and financial results, before proposing a framework for the future.

### Strategic alignment:

Our team wants to know — in detail — the preferences and desired outcomes for family members, to create a shared playbook.

# Astra's advantage

Astra strives to simplify the process, explaining each step in plain language and coordinating with attorneys and advisors to ensure efficiency throughout, including:

### Personalized service
We treat clients like family, offering white-glove support and long-term consistency.

### Expertise with empathy
Decades of fiduciary experience combined with a boutique, approachable style.

### Seamless transitions
We handle the heavy lifting so families can focus on what matters most.

## The Astra approach

We believe in bringing peace of mind for families and taking the guesswork out of trust management. After all, transitioning trustees is more than just a financial decision — it's an emotional one.

Astra is here to help you continue to grow your family's legacy — and to be the trusted teammate helping to make your financial goals a reality.

## Don't trust your trustee? Let's have a conversation.

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