

What does a successor trustee have to do first?

- Secure the house before anyone talks about listing it.
- Get the trust and a certification of trust.
- Tell the people the trust requires you to tell. In California that notice is often due within 60 days. Have counsel confirm the date.
- Keep trust money in a trust account, not your personal account.
- List what the trust owns and what it owes before anyone is paid.