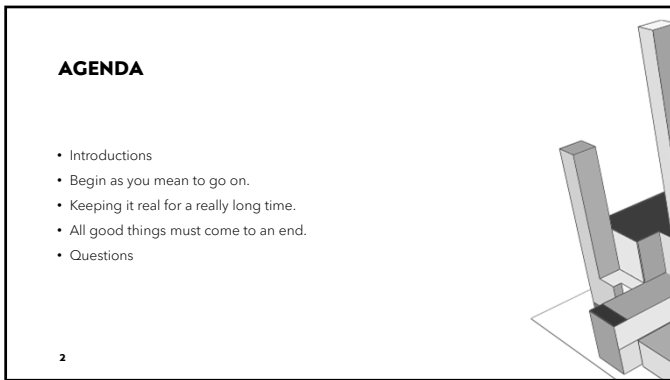
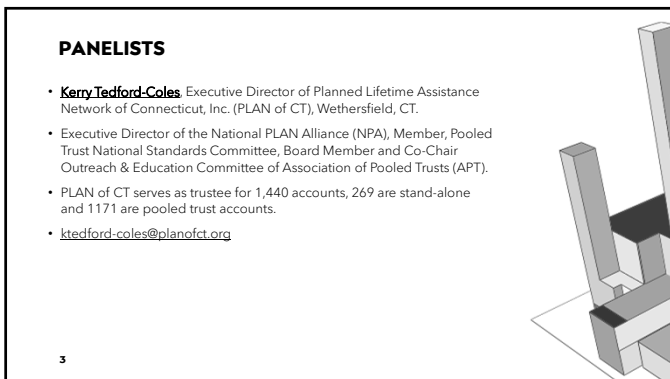


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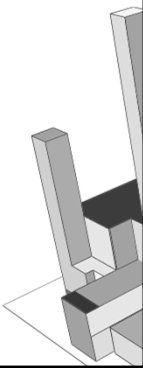
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PANELISTS

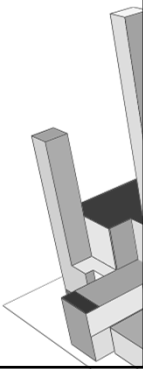
- **Stacy Scrip**, Trust Case Manager, Capital First Trust Company; Milwaukee, WI
- Registered Settlement Planner and Certified Trust and Financial Advisor; member of the Board of Directors of the Society of Settlement Planners.
- Capital First serves as Trustee for over 3,200 trusts, of which more than 500 are special needs trusts.
- sscrip@capitalfirsttrust.com



4

PANELISTS

- **Robert W. Fechtman**, Fechtman Law Office, Indianapolis, IN.
- Attorney in private practice focusing on older and disabled persons, estate planning and trusts, health law, Medicaid planning, professional trustee since 2004, Certified Elder Law Attorney by the National Elder Law Foundation; member of National Academy of Elder Law Attorneys, member and past president of the Special Needs Alliance. Bob serves as trustee for 199 trusts.
- rfechtman@indianaelderlaw.com




5

**BEGIN AS YOU MEAN
TO GO ON**

GETTING STARTED WITH A NEW TRUST



6




KEEPING IT REAL - COMMUNICATION AND ADAPTATION

Maintaining an effective
relationship between trustee and
beneficiary over time

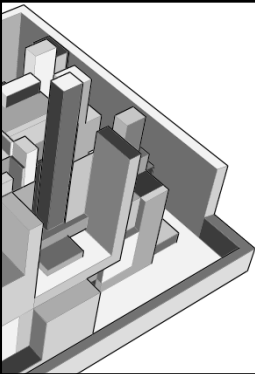
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ALL GOOD THINGS MUST COME TO AN END

STEPS IN TERMINATION OF A TRUST -
EXPECTED AND UNEXPECTED



8



QUESTIONS?

Panelists' checklists are found in
your materials.

9

