



UNIVERSITY OF CALIFORNIA
SANTA CRUZ

WHAT MAKES A GOOD TRUSTEE, EXECUTOR OR POWER OF ATTORNEY?



WEDNESDAY, MAY 24, 9:30-11 A.M.

Join us for a special seminar co-presented by UC Santa Cruz Office of Planned Giving and Community Foundation Santa Cruz County

at Community Foundation Santa Cruz County

7807 Soquel Drive, Aptos

Space is limited for this free workshop. Prior registration is required.

Register now

What Makes a Good Trustee, Executor or Power of Attorney?

Choosing a good trustee or executor and picking someone to have power of attorney on your behalf requires an understanding of their respective responsibilities, and how these change as you age. Learn about the qualities that make someone the right fit for each "job". Get tips on how to communicate your wishes for your care and for the ultimate distribution of your assets, to support your values, and to avoid family conflicts.

- What's the difference between a trustee, a co-trustee, and a successor trustee?
- Why are there two powers of attorney? Do I need two people?
- What if I don't have a friend or family member to have power of attorney or be my trustee?

[Click here for more detailed information about this seminar.](#)

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Learn more about UC Santa Cruz Office of Planned Giving at plannedgifts.ucsc.edu

Thank you Community Foundation Santa Cruz County for co-hosting this event



SPEAKER BIO



Karen Calcagno

Karen is the founder of [Advantage Family Business Center](#). For more than 20 years, she has guided families during estate settlements or family-owned business transitions. Karen advises trustees and executors, and facilitates family meetings when tough decisions need to be made.

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