

# Mercater for Trustee Investments

The duties of trustees can be onerous both from a moral and a legal point of view. In terms of investments the many duties of Trustees include the following:

- To ensure that investments are suitable for the Trust
- To ensure that investments are reviewed and monitored regularly
- To consider the interests of both the life tenant and the remaindermen
- To comply with the terms of the Trust
- To ensure beneficiaries are treated in accordance with the provisions of the Trust
- To provide information and accounts
- To take reasonable care
- To act jointly with any Co-Trustees
- To ensure that the assets are distributed to the correct beneficiaries
- To ensure that investments are suitable for the Trust.

Should the Trustees be found not to have fulfilled duties appropriately, the beneficiaries are entitled to sue in respect of any breach.

The delegation of investment responsibility to fully qualified investment professionals is therefore worthy of serious consideration for any Trustee. At Mercater we can ensure that a bespoke portfolio is constructed taking into consideration the various needs of all parties to the Trust.

All investments are monitored on a regular basis and detailed valuations are produced twice yearly to ensure that we can help you perform the duties of a Trustee effectively and efficiently.

If you feel that Mercater can help with your Trustee Investment please do not hesitate to contact us:

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