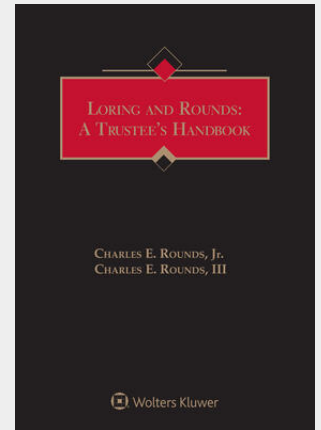


Loring and Rounds

A Trustee's Handbook, 2021 Edition

Loring and Rounds: A Trustee's Handbook is an invaluable practical resource that addresses the rights, duties, and obligations of the parties once the trustee takes title to trust property. This Handbook steers you through this complex field, providing property owners with a mechanism for seeing to the needs of beneficiaries in cost-effective, creative, efficient, and flexible ways. Loring and Rounds: A Trustee's Handbook is a handy, ready reference, and a gateway to the treatises, restatements, law review articles, uniform statutes, and cases you need to know. This fully integrated and bound volume of the 2021 Handbook brings you up to date on the latest cases, statutes, and developments, as well as new or updated discussion of topics as follow: - The Handbook continues the lengthy process of pruning some of the deadwood; significant exposition has been cut, revised, or combined. In sum, the Handbook is now even leaner, meaner, and more usable than ever. - In addition, numerous new cases and secondary sources have been added. These include the following: - The 2021 Handbook fully covers the fourth income and principal act issued by the Uniform Law Commission, namely the Uniform Fiduciary Income and Principal Act (2018), otherwise known as UFIPA. UFIPA has been covered extensively in this edition and has been added in many separate sections. - A new section covers remedies at law for breaches of trust, such as the tort of intentional interference with inheritance or acquisition by inter vivos transfer. - In addition, the Handbook has been updated with 200+ new cases, including: - Roth v. Jelley, holding that, when it comes to a judicial proceeding that could adversely affect the equitable property rights of a trust beneficiary, the beneficiary is entitled under the Due Process Clause of the Fourteenth Amendment to notice and an opportunity to be heard. This case also discusses the various consequences attendant to the failure to provide such notice. - Hector v. Bank of N.Y. Mellon, where the court, having in part looked to the Restatement (Third) for guidance, held that the designated passive corporate trustee of a securitized fund of mortgage-backed notes would not be personally at fault, and therefore, not personally liable for any injuries to the tenants of a certain parcel of real estate, title to which the trustee had acquired via foreclosure, that might be occasioned by their exposure to lead paint in and about the premises. - Murphy v. Trustee of Star Financial Bank, a case discussing the unfortunate linkage of survivorship and per stirpes: "to their surviving children per stirpes." The court held that the way in which "surviving" and "per stirpes" were linked rendered the provision itself ambiguous in that the "condition of survival negates the right of representation inherent in a per stirpes distribution." - 2020 Tax Rates for Trusts and 2021 Projected Tax Rate Schedule for Trusts Note: Online subscriptions are for three-month periods. Previous Edition: Loring and Rounds: A Trustee's Handbook, 2020 Edition, ISBN 9781543818666



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