

**TABLE OF TRUSTEE DUTIES
UNDER THE CALIFORNIA PROBATE CODE**

Duty	Reference	Description of Duty
Duty to Administer Trust	§16000	The Trustee has a duty to follow the terms of the Trust and the law governing the administration of Trusts.
Duty of Loyalty	§16002	The Trustee has a duty to administer the Trust exclusively for the benefit of Trust beneficiaries.
Duty of Impartiality	§16003	The Trustee has a duty to not favor the interests of one beneficiary over another, except if the Trust provides otherwise.
Duty to Avoid Conflict of Interest	§16004	The Trustee has a duty to avoid transactions that benefit the Trustee personally.
Duty Not to Require Beneficiary to Relieve the Trustee of Liability	§16004.5	The Trustee cannot require a beneficiary to waive their rights as a condition of distribution.
Duty to Not Undertake Adverse Trust	§16005	The Trustee may not act as Trustee of any other Trust that has a competing interest with this Trust.
Duty to Take Control of and Preserve Trust Property	§16006	The Trustee must gather Trust assets and take reasonable steps to preserve them.
Duty to Make Trust Property Productive	§16007	The Trustee has a duty, subject to certain qualifications, to make the Trust assets profitable.
Duty to Keep Trust Property Separate and Identified	§16009	The Trustee has a duty to keep the assets and debts of the Trust separate from the Trustee's own. In other words, the Trustee should not commingle funds.
Duty to Enforce Claims	§16010	The Trustee must take reasonable actions to pursue assets that may be owed to the Trust.
Duty to Defend Actions	§16011	The Trustee has the duty to take actions to prevent a loss to the Trust, such as by defending a lawsuit.
Duty Not to Delegate	§16012	Subject to certain exceptions, the Trustee must perform actions on behalf of the Trust rather than having others act on behalf of the Trust.
Co-trustee Duties	§16013	If the Trustee serves along with a Co-trustee, then each Trustee has a duty to participate in the administration and prevent the other from committing a breach of the Trust.
Duty to Use Special Skills	§16014	In managing the Trust property, the Trustee must use at least ordinary business ability. However, if the Trustee has special skills, the Trustee will be held to a higher standard of care.

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Duty to Provide Reasonable Information to Beneficiaries	§§16060-16064	The Trustee has a number of duties related to providing financial and other information to beneficiaries. Exceptions apply.
Duty to Render Accounts to Beneficiaries	§§16062-16064	The Trustee must render accounts to beneficiaries at designated intervals and upon significant events. Exceptions apply.
Discretionary Powers to Be Used Reasonably	§§16080-16081	Even if the Trust provides that a particular action is entirely within the Trustee's discretion, the Trustee has a duty to act reasonably in exercising that discretion.