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✓ 1. Recommendations

Quick Check uses Artificial Intelligence to analyze the document for arguments and facts to uncover relevant case law. Recommendations contains cases and other materials relevant to the issues in the analyzed document but that were not cited in it.

The Intersection of Faith and Law: Understanding How God's Trust and the Role of Trustees Intersect with Man's Law

Cases (0) [Jump to additional cases \(0\)](#)

No case recommendations provided for this heading, but please review briefs and secondary sources for additional recommendations.

Briefs & Memoranda (0)

No briefs and memoranda recommendations provided for this heading, but please review cases and secondary sources for additional recommendations.

Secondary Sources (2)

1. [§ 45. Settlor's expression of intent to have a trust](#)

July 03, 2024 • BOGERT § 45

2. [§ 399. Trust issues regarding church property in case of schism](#)

July 03, 2024 • BOGERT § 399

Additional cases (0)

No additional case recommendations provided for this heading, but please review briefs and secondary sources for additional recommendations.

Fiduciary Duty:

Cases (5) [Jump to additional cases \(7\)](#)

1. [Forbes v. Forbes](#)

Supreme Court of Wyoming. • May 12, 2022 • 509 P.3d 888 • 2022 WL 1497998

 High court

Case details**Motion type:** Motion for summary judgment

While a trust beneficiary is entitled to the trustee's proper exercise of its fiduciary duty, the Supreme Court's consideration of a breach of fiduciary claim is governed by the settlor's intent, not the beneficiaries' preferences.

Trust beneficiary had standing to raise claims against trustees for breach of fiduciary duty after trustees exercised right under trust provision to acquire for fair value shares in trust which beneficiary had transferred to two stepsons; complaint alleged the trustees had breached their fiduciary duty of loyalty, in part, through self-dealing, and that one trustee's purchase of a share through the sealed bidding process resulted in a benefit to herself at the expense of the beneficiaries, and beneficiary had a tangible interest in the manner in which that trust share was distributed to trustee.

2. Matter of J. Kent Kinniburgh Revocable Trust Dated January 27, 1992, as Amended and Restated

Supreme Court of Wyoming. • June 06, 2023 • 530 P.3d 579 • 2023 WL 3833808

 High court
  Last 2 years
Case details**Motion type:** Motion for attorney's fees**Highest level outcome:** Upheld appellate court's decision
 **Outcome:** Removal of co-trustees was not warranted under the circumstances.

While a beneficiary is entitled to the trustee's proper exercise of its fiduciary duty, the court's consideration of a breach of fiduciary claim is governed by the settlor's intent, not the beneficiaries' preferences.

Removal of co-trustees was not warranted under the Wyoming version of the Uniform Trust Code, though trustees had breached their duty to inform and report; objecting beneficiary did not show that trustees committed serious breach of trust, that trustees persistently failed to effectively administer the trust, or that there was a substantial change in circumstances, objecting beneficiary was the only beneficiary requesting removal, trustees had administered trust for short amount of time and complied with formal request to provide all documentation to beneficiaries, trustees made efforts to maintain contact with beneficiaries and reasonably inform them of status of trust, there was no indication that trustees would not continue to administer trust impartially, and beneficiary did not make enhanced showing of gross and willful misconduct necessary to remove settlor-appointed trustees. Wyo. Stat. Ann. SS 4-10-706(b), 4-10-813.

3. Acorn v. Moncecchi

Supreme Court of Wyoming. • December 22, 2016 • 386 P.3d 739 • 2016 WL 7406999

 Frequently cited
  High court
Case details**Movant at trial level:** Plaintiff

Common duty owed by a trustee goes beyond mere good faith unless otherwise provided by express terms of the trust.

Where trust provided that trustee "will be indemnified and held harmless from the good faith exercise of all powers, duties, and elections of Trustee," trustee's duty of good faith did not go beyond mere good faith, and thus trustee was required to conduct herself in compliance with duty of good faith and statutory provisions regarding a trustee's duty of loyalty. Wyo. Stat. Ann. SS 4-10-905, 4-10-906.


4. **Shriners Hospitals for Children v. First Northern Bank of Wyoming**

Supreme Court of Wyoming. • May 18, 2016 • 373 P.3d 392 • 2016 WL 2902698

 High court

Case details

Highest level outcome: Upheld appellate court's decision

 **Outcome:** Removal of trustee was not justified

When interpreting a trust, courts construe the trust instrument as a whole, attempting to avoid construction that renders a provision meaningless.

Removal of trustee by trust beneficiary was not justified, and thus trial court did not abuse its discretion in denying beneficiary's request to remove trustee, absent showing of breach of fiduciary duty, conflict of interest, self-dealing, or any type of gross and willful misconduct by trustee. West's Wyo.Stat. Ann. SS 4-10-706(b), 4-10-801, 4-10-1001(b)(vii).

5. **In re Robert and Irene Redland Family Trust, Dated August 10, 1989**

Supreme Court of Wyoming. • February 08, 2019 • 435 P.3d 349 • 2019 WL 494069


 High court

Case details

Motion type: Judgment

Trial level outcome: Motion granted

Highest level outcome: Upheld appellate court's decision

 **Outcome:** Hostility between daughter and certain trust beneficiaries did not interfere with proper administration of trust and, thus, did not require removal of daughter.

Hostility between the trustee and the beneficiaries of the trust alone is insufficient to require the removal of the trustee.

Hostility between one of co-trustees and certain trust beneficiaries did not interfere with proper administration of trust and, thus, did not require removal of co-trustee; parties were able to resolve their differences to

the extent necessary to permit the beneficiaries to utilize the trust property and beneficiaries followed the decisions made by the majority of the co-trustees even if disagreement existed with respect to the decision.

Briefs & Memoranda (0)

No briefs and memoranda recommendations provided for this heading, but please review cases and secondary sources for additional recommendations.

Secondary Sources (0)

No secondary source recommendations provided for this heading, but please review cases and briefs for additional recommendations.

Additional cases (7)

1. Wells Fargo Bank Wyoming, N.A. v. Hodder

Supreme Court of Wyoming. • October 13, 2006 • 144 P.3d 401 • 2006 WL 2919154

Case details

Movant at trial level: Plaintiff

Trust agreements are subject to the same rules of construction as contracts.

Trustee failed to cite to the record on appeal to support proposition in appellate brief that it argued at trial that it informed beneficiaries by correspondence that it was withholding \$120,000 from trust to cover litigation expenses incurred in defending beneficiaries' breach of duty claims, and thus Supreme Court would affirm trial court ruling that trustee was not entitled to withhold trust funds to cover costs associated with the litigation.

2. Jackson v. Drury

Appellate Court of Connecticut. • August 06, 2019 • 191 Conn.App. 587 • 216 A.3d 768

Case details

Motion type: Other

Trial level outcome: Motion granted

Appellate level outcome: Upheld trial court's decision

 **Outcome:** One beneficiary alleged no direct personal injury and thus she lacked standing to appeal

Superior court is without jurisdiction to entertain an appeal from probate unless the appeal complies with the conditions designated by statute as essential to the exercise of that power. Conn. Gen. Stat. Ann. S 45a-186.

Beneficiary of trust failed to allege a colorable claim of direct personal injury and thus was not aggrieved by decree of probate court finding that trustee charged reasonable attorneys' fees to subtrusts for other beneficiaries and did not breach fiduciary duty, such that beneficiary lacked standing to appeal the decree;

beneficiary had no interest in the subtrusts, her trust was not affected, and her interest, if any, was indirect and amorphous and derivative of others. Conn. Gen. Stat. Ann. S 45a-186(a).

3. **Gowdy v. Cook**


Supreme Court of Wyoming. • January 08, 2020 • 455 P.3d 1201 • 2020 WL 90720

Case details

Motion type: Motion for summary judgment

Trial level outcome: Motion granted

Highest level outcome: Upheld appellate court's decision

 **Outcome:** There was no evidence that beneficiary or trust were damaged by allegedly improper conduct of attorneys, as required for beneficiary's legal malpractice and breach of fiduciary duty claims

Supreme Court construes a trust instrument as a whole, attempting to avoid a construction which renders a provision meaningless.

There was no evidence that trust beneficiary or trust was damaged by any of the alleged improper actions of two attorneys, who drafted trust and beneficiary's estate planning documents and served as trustee and trust protector, as required to support beneficiary's claims for legal malpractice and breach of fiduciary duties.


4. **In re Probate Appeal of Douglas McIntyre**

Appellate Court of Connecticut. • September 14, 2021 • 207 Conn.App. 433 • 263 A.3d 925

Case details

Motion type: Other

Appellate level outcome: Reversed trial court's decision

 **Outcome:** The Superior Court's application of incorrect burden of proof was not harmless, warranting reversal and remand.

In the context of an appeal from the Probate Court, the Superior Court may not consider or adjudicate issues beyond the scope of those proper for determination by the order or decree attacked; the Superior Court, therefore, cannot enlarge the scope of the appeal.

Since the Superior Court did not consider whether removal of Uniform Transfer to Minors Act (UTMA) account's custodian was required to protect against continuing depletion, the court's application of incorrect burden of proof was not harmless, and thus reversal and remand were warranted, in custodian's appeal from order of Probate Court granting account beneficiary's mother's petition to remove him and appoint her as successor custodian; the court did not discuss significance of the finding that custodian used funds for personal legal expenses based on advice of counsel, whether custodian otherwise properly managed account, evidence that mother was aware of and consented to certain withdrawals, that withdrawals were on advice of financial advisor, or that funds were returned to account. Conn. Gen. Stat. Ann. S 45a-557 et seq.

5. DAVID M. HAVILAND IN HIS CAPACITY AS EXECUTOR OF THE ESTATE OF WAYNE D. LEIZEAR v. DAVID L. JOHNSON, ET AL.

Superior Court of Connecticut, JUDICIAL DISTRICT OF HARTFORD. • January 30, 2025 • Not Reported in Atl. Rptr. • 2025 WL 384148

Case details

Motion type: Motion to compel

Weighing the values underlying the attorney-client privilege against the right of beneficiaries to be informed regarding the administration of a trust or an estate, the court is not persuaded that the attorney-client privilege must give way to the beneficiaries right to information. At the outset, a trustee's duty to inform is not absolute. Section 45a-499kkk limits the duty to furnishing information about the administration of the trust and the material facts necessary for [the beneficiaries] to protect their interests. (Emphasis added.) A trustee cannot avoid the duty to inform beneficiaries of material facts simply by communicating them to an attorney.

6. Wolfel v. Wolfel

Appellate Court of Connecticut. • April 18, 2023 • 218 Conn.App. 760 • 292 A.3d 1261

Case details

Motion type: Judgment

Appellate level outcome: Upheld trial court's decision

Movant at trial level: Plaintiff



Outcome: Superior Court's determination that co-trustee failed to demonstrate that he reimbursed trust for distributions made to co-trustee for his personal benefit was not clearly erroneous

Statute that provided exception to requirement that Superior Court review Probate Court decisions de novo for appeals from decisions rendered in case after recording of proceedings had been made did not apply on review of Probate Court's determination that co-trustees of trust breached fiduciary duties and order that beneficiary be paid funds; co-trustees and beneficiary did not dispute that no record was made before Probate Court. Conn. Gen. Stat. Ann. S 45a-186(d).

Superior Court's decision, in reviewing Probate Court's determination that co-trustees breached fiduciary duties, that co-trustee failed to demonstrate that he reimbursed trust for distributions made to co-trustee for his personal benefit was not clearly erroneous; following trial, court issued memorandum in which it discussed in detail evidence presented by co-trustees in support of reimbursement claims, and after weighing such evidence, court determined co-trustees proved that co-trustee reimbursed trust only portion of distributed amount, and while co-trustees argued beneficiary did not rebut evidence they presented, which purportedly showed repayment of funds, co-trustees had burden of proving proper administration of trust, and court was not required to credit evidence.

7. **Salce v. Cardello**

Supreme Court of Connecticut. • September 26, 2023 • 348 Conn. 90 • 301 A.3d 1031


Case details

Motion type: Judgment

Trial level outcome: Motion granted

Appellate level outcome: Upheld trial court's decision

Highest level outcome: Upheld appellate court's decision

 **Outcome:** The Supreme Court, Robinson, C.J., held that daughter's actions, in challenging executor's refusal to remove her personal bank account from estate and gift tax return and to deduct outstanding mortgages from value of estate on the return, were based in good faith, and, thus, enforcement of in terrorem clauses against daughter would violate public policy.

In ruling on a probate appeal, the Superior Court exercises the powers, not of a constitutional court of general or common-law jurisdiction, but of a Probate Court.


In terrorem clauses in will and trust agreement implicated Probate Court's exercise of its statutorily mandated supervisory responsibilities, as required for public policy exception to enforcement of clauses to apply to beneficiary, who challenged executor's refusal to remove beneficiary's personal bank account from estate and gift tax return filed on behalf of estate and to deduct outstanding mortgages from value of estate on the return; in terrorem clauses implicated Probate Court's supervision over fiduciary via accounting process, and in connection with that accounting Probate Court was called to consider whether executor had properly discharged his responsibilities to minimize estate's tax burden and his obligation not to mismanage estate assets. Conn. Gen. Stat. Ann. SS 45a-175, 45a-233(d), 45a-242(a).

Accountability:

Cases (2) [Jump to additional cases \(2\)](#)

1. **Boyd v. Boyd**

Court of Appeal of Louisiana, First Circuit. • February 11, 2011 • 57 So.3d 1169 • 2011 WL 839410

 **Outcome:** District Court's contempt holding against trustee for failing to furnish a previously ordered accounting constituted legal error

The trustee's duty to furnish information to the beneficiary is mandatory. LSA-R.S. 9:2089.

Documentation provided by trustee to co-beneficiary in response to her request for information was sufficient to comply with her request under statutory provision that requires a trustee to give a beneficiary information upon request at reasonable times, even though it was insufficient to constitute compliance with the statutory requirements for a detailed annual account, and thus, trial court's contempt holding against trustee for failing

to furnish a previously ordered accounting constituted legal error, where the court failed to consider whether information provided was a sufficient response to co-beneficiary's request for information. LSA-R.S. 9:2088, 9:2089.

2. Fontenot v. Fontenot


Court of Appeal of Louisiana, Third Circuit. • December 13, 2023 • 378 So.3d 189 • 2023 WL 8609425

 Last 2 years

Case details

Motion type: Motion to quash or vacate a subpoena **Trial level outcome:** Motion granted

Appellate level outcome: Reversed trial court's decision

 **Outcome:** The Court of Appeal, Savoie, J., held that subpoena duces tecum was appropriate method for beneficiaries to obtain records of corporation.

The duty of loyalty is the fundamental duty owed by a trustee as a fiduciary. La. Rev. Stat. Ann. S 9:2082(A).

Court of Appeal would not consider non-party corporation's argument or proffered evidence that subpoena duces tecum issued by trust beneficiaries was issued in bad faith, in beneficiaries' appeal from grant of corporation's motion to quash subpoena, in proceedings against trustees for breach of fiduciary duty; trial court rejected corporation's argument, and beneficiaries did not appeal trial court's decision or exclusion of that proffered evidence from the record.

Briefs & Memoranda (0)

No briefs and memoranda recommendations provided for this heading, but please review cases and secondary sources for additional recommendations.

Secondary Sources (0)

No secondary source recommendations provided for this heading, but please review cases and briefs for additional recommendations.

Additional cases (2)

1. In re Harrier Trust


Court of Appeal of Louisiana, Third Circuit. • January 30, 2019 • 264 So.3d 526 • 2019 WL 361648

Case details

Motion type: Motion for summary judgment

Trial level outcome: Motion granted

Appellate level outcome: Upheld trial court's decision

 **Outcome:** Compensation package provided to co-trustees by trustee did not change them from disinterested to interested parties.

Statutory provisions relative to the responsibilities of a trustee are very rigid and hold the trustee to an even higher fiduciary responsibility to his beneficiary than that owed by a succession representative to heirs; the very word "trustee" implies the strongest obligation on the part of the trustee to be chaste in all dealings with the beneficiary.

Compensation package provided to co-trustees by trustee did not change them from "disinterested" to "interested" parties in order to disqualify them in advance under the trust as being interested persons unqualified to act as co-trustees; beneficiary had the right to question the compensation of co-trustees in the future by specific challenge to the same or to challenge particular actions of co-trustees as being in violation of their fiduciary duty, issues that were not before the court.

2. Crutcher-Tufts Resources, Inc. v. Tufts

Court of Appeal of Louisiana, Fourth Circuit. • April 28, 2010 • 38 So.3d 987 • 2010 WL 1727853

Case details

Motion type: Peremptory exception of no cause of action
Appellate level outcome: Upheld trial court's decision

 **Outcome:** Alter ego theory did not apply

Because trust could only act through its trustee, trustee's alleged actions, in dominating trust, obtaining financial benefits for himself and his company, and using his power over voting rights of trust to improperly remove officers from plaintiff corporation, could not serve as basis for finding trust liable for trustee's alleged breach of fiduciary duty on alter ego theory. LSA-R.S. 9:1781.

Protection of Beneficiaries:

Cases (1) [Jump to additional cases \(5\)](#)

1. Matter of Otto Bremer Trust

Court of Appeals of Minnesota. • January 17, 2023 • 984 N.W.2d 888 • 2023 WL 193144

Case details

Movant at trial level: Plaintiff
Appellate level outcome: Upheld trial court's decision

 **Outcome:** AGO established that trustee violated duty of loyalty through his self-dealing

For trustees to satisfy the duty of information, trustees must disclose to qualified beneficiaries fully, frankly, and without reservation all facts pertaining to the trust. Minn. Stat. Ann. S 501C.0813(a).

Attorney General's Office (AGO) established that trustee of charitable trust created for the benefit of the public violated the duty of loyalty through his self-dealing, as would support AGO's claim that trustee committed a serious breach of trust warranting his removal; trustee admitted he used the trust's assets for non-trust purposes "probably from the day (he) arrived" at the trust, that his use of the trust's resources constituted self-dealing under the IRS code, which caused the trust to incur a tax on self-dealing, and that misuse of assets was prohibited under the general duty of loyalty and under the Charitable Trust Act. Minn. Stat. Ann. SS 501B.32(1)(b), 501B.41(6), 501C.0706(b)(1), 501C.0802(a), 501C.1001(a).

Briefs & Memoranda (0)

No briefs and memoranda recommendations provided for this heading, but please review cases and secondary sources for additional recommendations.

Secondary Sources (0)

No secondary source recommendations provided for this heading, but please review cases and briefs for additional recommendations.

Additional cases (5)

1. Matter of Otto Bremer Trust


Supreme Court of Minnesota. • February 07, 2024 • 2 N.W.3d 308 • 2024 WL 462587

Case details

Motion type: Judgment

Appellate level outcome: Upheld trial court's decision

Highest level outcome: Upheld appellate court's decision

 **Outcome:** Statutory ground for removal of trustee due to serious breach of trust did not require showing that breach worked material and substantive harm on trust

Trustees must disclose fully, frankly, and without reservation all facts pertaining to the trust, and the duty does not end at the commencement of a legal proceeding. Minn. Stat. Ann. S 501C.0813(a).

Statutory ground for removal of trustee of charitable trust due to "serious breach" of trust did not require showing that breach worked "material and substantive harm" on trust; statute used nearly identical language of Uniform Trust Code, which provided adequate definition of "serious breach" as "single act that causes significant harm or involves flagrant misconduct" or "series of smaller breaches, none of which individually justify removal when considered alone, but which do so when considered together." Minn. Stat. Ann. S 501C.0706(b)(1); Uniform Trust Code S 706.


2. Thomas B. Olson & Associates, P.A. v. Leffert, Jay & Polglaze, P.A.

Court of Appeals of Minnesota. • October 21, 2008 • 756 N.W.2d 907 • 2008 WL 4629127

Case details

Motion type: Motion for summary judgment

Movant at trial level: Defendant

 **Outcome:** Genuine issue of material fact existed, precluding summary judgment to defendants on breach of fiduciary duty claim

A trustee-beneficiary relationship necessarily gives rise to a fiduciary duty in the trustee toward the beneficiary.

Genuine issue of material fact existed as to whether attorney's clients established a trust pursuant to which attorney owed clients' former attorney a fiduciary duty to maintain sufficient funds in trust account of attorney's law firm until former attorney's lien against clients' settlement proceeds was resolved, thus precluding summary judgment to attorney and his firm on former attorney's claim against them for breach of fiduciary duty, arising after attorney transferred settlement proceeds to his firm's operating account and another attorney.

3. Lund as trustee of Revocable Trust of Kim A. Lund v. Lund

Court of Appeals of Minnesota. • January 14, 2019 • 924 N.W.2d 274 • 2019 WL 178461

Case details

Motion type: Other

Trustees owe beneficiaries fiduciary duties of loyalty, full disclosure, and action pursuant to the terms of the trust.

Trial court did not abuse its discretion by removing one of named trustees, upon revocable trust beneficiary's request; court found substantial change in circumstances based on court-ordered buy-out of corporations held in trusts and deteriorated relationship between trustee and beneficiary, trustee's removal had been requested by all qualified beneficiaries, and trustee's removal was not inconsistent with material purpose of trusts, which was to provide lifetime benefits to beneficiary without exposing assets to taxes after her death. Minn. Stat. Ann. S 501C.0706(b)(4).

4. In re Joan C. Ranallo Trust

Court of Appeals of Minnesota. • March 27, 2023 • Not Reported in N.W. Rptr. • 2023 WL 2637379


Case details

Appellate level outcome: Upheld trial court's decision

A trustee has a duty to administer the trust impartially, giving due regard to the beneficiaries respective interests. Minn. Stat. 501C.0803 (2022) ; see *In re Est. of King*, 668 N.W.2d 6, 9 (Minn. App. 2003) . In other words, if a trust has two or more beneficiaries, the trustee must manage the trust with equal consideration for the interests of all beneficiaries. *In re Van Dusen Marital Tr.*, 834 N.W.2d 514, 521 (Minn. App. 2013) (quotation omitted), rev. denied (Minn. June 26, 2013).

5. *In re Trusteeship Created by City of Sheridan*

Court of Appeals of Minnesota. • May 05, 1999 • 593 N.W.2d 702 • 1999 WL 289247

 **Outcome:** The Court of Appeals, Willis, J., held that: (1) district court properly exercised jurisdiction over trust; (2) trust instrument gave trustee authority to sell facility upon city's default; (3) district court did not abuse its discretion in finding that trustee did not breach its fiduciary duties, but (4) district court was required to make findings regarding reasonableness of fees claimed by trustee.

Under Colorado law, a trustee owes a fiduciary duty to the beneficiaries of the trust.

Statute allowing trustee to petition for an order directing sale of trust assets which included real property located in state did not apply to assets of trust for financing of municipal facility, consisting of real property in Colorado, and, thus, did not limit district court's jurisdiction over trustee's petition for order directing sale of facility to city. M.S.A. SS 501B.16, 501B.24, 501B.46(b).

Several key principles in modern trust law reflect biblical teachings:

Cases (5) [Jump to additional cases \(3\)](#)

1. *Pennsylvania Environmental Defense Foundation v. Commonwealth*

Supreme Court of Pennsylvania. • July 21, 2021 • 667 Pa. 179 • 255 A.3d 289


 High court

Case details

Motion type: Motion for declaratory judgment

Appellate level outcome: Upheld trial court's decision

Highest level outcome: Reversed appellate court's decision



 **Outcome:** That income could not be diverted from trust corpus to General Fund for non-trust purposes without violating Amendment.

A trustee's basic fiduciary duty is to administer the trust.

Funds from upfront bonus payments, rentals, and penalty interest received by Commonwealth for oil and gas leases on state forest and game lands could not be diverted from corpus of natural resources trust to

General Fund for non-trust purposes without violating Environmental Rights Amendment, even though the funds qualified as income streams and not sale of trust assets; nothing in plain language of Amendment could be reasonably construed as authority to treat current generation of Pennsylvanians as life tenants entitled to income from trust assets, and Commonwealth was to act as a trustee managing the corpus, not as a sovereign owner that could use income in a manner that did not benefit the trust. Pa. Const. art. 1, S 27; 72 Pa. Stat. Ann. SS 1602-E, 1603-E, 1604-E, 1605-E.

This Recommendation relates to cases already cited in the analyzed document

-  [Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950 669 Pa. 25](#)
-  [Forbes v. Forbes 341 P.3d 1041](#)

2. In re Trust Established Under Agreement of Sarah Mellon Scaife, Deceased Dated May 9, 1963


Superior Court of Pennsylvania. • May 23, 2022 • 276 A.3d 776 • 2022 WL 1613219

Case details

Motion type: Motion to compel discovery

Trial level outcome: Motion granted



Appellate level outcome: Upheld trial court's decision

 **Outcome:** The Superior Court, No. 722 WDA 2021, Murray, J., held that fiduciary exception to attorney-client privilege required trustee to disclose communications with counsel regarding trust administration.

A trustee cannot withhold from any beneficiary documents regarding the management of the trust, including opinions of counsel procured by the trustee to guide the trustee in the administration of the trust, because trust law imposes a duty to make these documents available to the beneficiaries. 20 Pa. Cons. Stat. Ann. S 7780.3(a).

Corporate trustee was obligated to disclose to trust beneficiaries opinions of and communications with trust's counsel regarding matters of trust administration, and, thus, attorney-client privilege did not preclude discovery of such documents, on trustees' petition for adjudication of whether trustees' failure to create separate trust for beneficiary breached their fiduciary duty, even if trust did not pay counsel fees; trustee's fiduciary duty required it to disclose trust management documents to beneficiaries, duty extended to opinions of counsel procured by trustee to guide its administration of trust, rather than to protect trustee personally in course or anticipation of litigation, and payment of attorney fees was not dispositive as to attorney-client relationship. 20 Pa. Cons. Stat. Ann. S 7780.3(a); 42 Pa. Cons. Stat. Ann. S 5928.

This Recommendation relates to cases already cited in the analyzed document

-  [Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950 669 Pa. 25](#)
-  [Forbes v. Forbes 341 P.3d 1041](#)


3. In re Estate of McAleer

Supreme Court of Pennsylvania. • April 07, 2021 • 665 Pa. 275 • 248 A.3d 416

 High court

Case details

Motion type: Motion to compel discovery

 **Outcome:** Orphan's Court order was immediately appealable as collateral order

Orphans' Court order directing trustee to comply with beneficiary's discovery request for unredacted copies of invoices from law firms the trustee retained was separable from beneficiary's action against trustee, seeking an accounting relating to the administration of trust and, thus, was immediately appealable as collateral order; beneficiaries' initial challenges to administration of trust were raised before trustee disclosed amount of attorney fees paid from trust corpus and, after disclosure, beneficiaries immediately filed petition for special relief pertaining to those expenses. Pa. R. App. P. 313.


This Recommendation relates to cases already cited in the analyzed document

 [Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950 669 Pa. 25](#)

 [Forbes v. Forbes 341 P.3d 1041](#)

4. Pennsylvania Environmental Defense Foundation v. Commonwealth

Supreme Court of Pennsylvania. • August 05, 2022 • 279 A.3d 1194 • 2022 WL 3133921

 High court


Case details

Motion type: Motion for declaratory judgment

Appellate level outcome: Upheld trial court's decision



Movant at trial level: Plaintiff

Highest level outcome: Upheld appellate court's decision

 **Outcome:** Use of Lease Fund monies for general operations of Department of Conservation and Natural Resources (DCNR) did not facially violate Amendment

Commonwealth's appropriation and use of monies from Oil and Gas Lease Fund to pay for general government operations of Department of Conservation and Natural Resources (DCNR), pursuant to General Appropriations Act, was within Commonwealth's authority, as trustee, to incur costs in administering the trust to conserve and maintain the Commonwealth's public natural resources under Environmental Rights Amendment, and thus no facial violation of Amendment occurred, absent a demonstration that those administrative costs were unreasonable or that the DCNR failed to act with prudence, loyalty, or impartiality in carrying out its fiduciary duties. Pa. Const. art. 1, S 27; 71 Pa. Stat. Ann. S 1340.101(b).

This Recommendation relates to cases already cited in the analyzed document


-  [Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950 669 Pa. 25](#)
-  [Forbes v. Forbes 341 P.3d 1041](#)

5. In re Paxson Trust I

Superior Court of Pennsylvania. • January 27, 2006 • 893 A.2d 99 • 2006 WL 198324

Case details



Movant at trial level: Plaintiff

 **Outcome:** Trust deed executed by children's maternal grandfather, conveying family home to children's parents as trustees for the children, granted parents a life estate in the home

Rule that a trustee is under a duty to the beneficiary to administer the trust solely in the interest of the beneficiary prohibits both self-dealing and conflicts of interest.

Trust deed executed by children's maternal grandfather, conveying family home to children's parents as trustees for the children, granted parents a life estate in the home, as deed stated that parents could occupy the premises for and during the term of their natural life, trust deed distinguished between the parents' status as trustees and their status in their personal capacity of beneficiaries of the trust, and parents' non-trustee personal capacities were as life tenants.

This Recommendation relates to cases already cited in the analyzed document

-  [Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950 669 Pa. 25](#)
-  [Forbes v. Forbes 341 P.3d 1041](#)

Briefs & Memoranda (0)

No briefs and memoranda recommendations provided for this heading, but please review cases and secondary sources for additional recommendations.

Secondary Sources (2)

1. § 543. Trustee's duty of loyalty to the beneficiaries

July 03, 2024 • BOGERT § 543

2. Cause of Action Against Trustee for Self-Dealing 14 Causes of Action 411

November 26, 2024 • 14 COA 411

Additional cases (3)

1. Pennsylvania Environmental Defense Foundation v. Commonwealth


Supreme Court of Pennsylvania. • June 20, 2017 • 640 Pa. 55 • 161 A.3d 911

Case details

Motion type: Motion for summary judgment

Appellate level outcome: Upheld trial court's decision

Movant at trial level: Defendant

 **Outcome:** Appellate record was not sufficiently developed to conclude whether all revenues generated by leases remained in corpus of trust

The duty of loyalty imposes an obligation on the trustee to manage the corpus of the trust so as to accomplish the trust's purposes for the benefit of the trust's beneficiaries. Restatement (Second) of Trusts S 186.


Appellate record was not sufficiently developed to conclude whether all revenues generated for Commonwealth by oil and gas leases remained in corpus of natural resources trust under Environmental Rights Amendment, requiring remand to Commonwealth Court; even though royalties were unequivocally proceeds from sale of oil and gas resources and were part of trust corpus, true purpose of up-front bonus bid payments was not stated in record, and could have represented payment for rental of leasehold interest in land, payment for natural gas extracted, or some other purpose. Pa. Const. art. 1, S 27; 20 Pa. Cons. Stat. Ann. S 8145; 72 Pa. Stat. Ann. SS 1604-E, 1605-E.

2. In re Scheidmantel

Superior Court of Pennsylvania. • January 05, 2005 • 868 A.2d 464 • 2005 WL 19229

Case details

Movant at trial level: Plaintiff

 **Outcome:** Trustee failed to act in an expeditious manner to wind up trust.

A trustee is under a duty to the beneficiary, and if the trustee has greater skill than that of a man of ordinary prudence, he is under a duty to exercise such skill as he has.

Trustee failed to act in an expeditious manner to wind up trust and distribute the trust estate to beneficiaries, where trustee provided no explanation why it took approximately eighteen months to liquidate assets comprised entirely of mutual fund shares, cash, and shares of publicly traded common stock that could be distributed in kind.


3. In re Dentler Family Trust

Superior Court of Pennsylvania. • April 22, 2005 • 873 A.2d 738 • 2005 WL 928433

Case details

Movant at trial level: Plaintiff

Appellate level outcome: Upheld trial court's decision




 **Outcome:** Trial court did not abuse its discretion by requiring trustee to disgorge legal fees and investment advising fees

Trial court did not abuse its discretion by requiring trustee to disgorge legal fees and investment advising fees he earned while administering trust, where trustee put one beneficiary's share at risk to make distribution to co-trustee who was also a beneficiary, managed trust as if trustee beneficiary were only party with an interest in the trust, and commingled funds belonging to the two beneficiaries.

2. Warnings for cited authority

Verify that the authority cited within the analyzed document are still good law. Quick Check runs a full KeyCite check on all the citations imported from the document and displays any potential issues.

Summary

Treatment	 Severely negative	 Overruling risk	 Negative	 Pending appeal	No KeyCite treatment
Cases (11)	1	1	9	0	1
Regulations (0)	0	0	0	0	0
Statutes (1)	0	0	1	0	0
Trial Court Orders (0)	0	0	0	0	0
Secondary Sources (0)	0	0	0	0	0
Administrative Decisions & Guidance (0)	0	0	0	0	0

Cases (11)

1. The Episcopal Church v. Salazar

Court of Appeals of Texas, Fort Worth. • April 05, 2018 • 547 S.W.3d 353 • 2018 WL 1631395

Depth of discussion  Cited

Judgment Affirmed in Part, Reversed in Part by [Episcopal Diocese of Fort Worth v. Episcopal Church](#) Tex. May 22, 2020

...Court, Tarrant County, granted summary judgment to church. Diocese appealed. The Supreme Court, 422 S.W.3d 646, reversed and remanded. On remand, the District Court, John P. Chupp, J., entered summary judgment in favor of diocese and intervening local congregations. Church appealed. The Fort Worth Court of Appeals, Sudderth, C.J., **547 S.W.3d 353**, reversed and rendered in part, reversed and remanded in part, and affirmed in part. Local diocese's petition for review and national church's conditional cross petition were granted. Holdings: The Supreme Court, Guzman, J., held that:(1) equitable title to real property held by trust for diocese was...

Negative treatment: [Most recent](#) [Distinguished \(0\)](#) [All \(2\)](#)

2. Matter of Trust Known as Great Northern Iron Ore Properties

Supreme Court of Minnesota. • February 10, 1978 • 263 N.W.2d 610

📅 10+ years

Depth of discussion ■■■■ Cited

Not Followed as Dicta [Northstar Financial Advisors, Inc. v. Schwab Investments](#) N.D.Cal. August 8, 2011 ...to Fund investors, and that these claims would have to be asserted derivatively. The two main cases Northstar relies on for the ability of the Fund investors to sue directly for a breach of fiduciary duty are [Fogelin v. Nordblom](#), 402 Mass. 218, 222, 521 N.E.2d 1007 (1988), and [In re Great N. Iron Ore Properties, 263 N.W.2d 610, 620 \(Minn.1978\)](#) Fogelin involved a Massachusetts Business Trust established in 1957 "for dealing in real estate." Fogelin, 402 Mass. at 220, 521 N.E.2d 1007. Robert C. Nordblom, one of three trustees, was initially the owner of all 500...

3. Forbes v. Forbes

Supreme Court of Wyoming. • January 23, 2015 • 341 P.3d 1041 • 2015 WL 302271

📅 10+ years

Depth of discussion ■■■■ Cited

Declined to Extend by [Willey v. Willey](#) Wyo. December 5, 2016 ...ex rel. Wyo. Workers' Safety & Comp. Div., 2012 WY 71, ¶ 30, 276 P.3d 399, 407 (Wyo. 2012), we determined that Morris' clear objection to and request to exclude a late expert witness designation sufficiently preserved her challenge to the testimony's admission on appeal. We relied on Morris in [Forbes v. Forbes, 2015 WY 13, ¶ 82, 341 P.3d 1041, 1063 \(Wyo. 2015\)](#) , when we determined a motion in limine and objection in a pretrial ruling was sufficient to preserve a claim regarding an expert's testimony on appeal. In [Forbes](#) , we explained that in the cases where the issue...

Negative treatment: [Most recent](#) [Distinguished \(1\)](#) [All \(2\)](#)

4. Uzyel v. Kadisha

Court of Appeal, Second District, Division 3, California. • September 22, 2010 • 188 Cal.App.4th 866 • 116 Cal.Rptr.3d 244

📅 10+ years

Depth of discussion ■■■■ Cited

Declined to Extend by [Jinkins v. Sharpe](#) Cal.App. 6 Dist. April 2, 2024 ...include, among others, the duty of loyalty, the duty to avoid conflicts of interest, the duty to preserve trust property, the duty to make trust property productive, and the duty to report and account. [City of Atascadero v. Merrill Lynch, Pierce, Fenner & Smith, Inc. \(1998\) 68 Cal.App.4th 445, 462 Uzyel v. Kadisha \(2010\) 188 Cal.App.4th 866, 888Uzyel](#)); see §§ 16002 16006 16060 The duty of loyalty set forth in section

16002, subdivision (a), requires the trustee 'to act in the highest good faith'Trolan, supra, 31 Cal.App.5th at p. 959) toward the beneficiaries of the trust and...

Negative treatment: [Most recent](#) [Distinguished \(5\)](#) [All \(6\)](#)

5. Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950

Supreme Court of Pennsylvania. • October 04, 2021 • 669 Pa. 25 • 260 A.3d 81


Depth of discussion Cited

Distinguished by [In re Atwater Kent Museum](#) Pa.Cmwth. December 19, 2024
 ...record established that Drexel would not comply with those terms. The court further opined that the Society failed to establish it had any interest, let alone a "substantial, direct, or immediate interest," that would be affected by the transfer of the Collection to Drexel. Id. at 12-14, 16 (discussing [Tr. Under Will of Augustus T. Ashton, 669 Pa. 25, 260 A.3d 81 \(2021\)Ashton](#)), and Valley Forge Hist. Soc'y v. Wash. Mem'l Chapel, 493 Pa. 491, 426 A.2d 1123 (1981)Valley Forge II. APPLICATION TO QUASH 5[1][2] [3]The orphans' court orally denied the Society's first...

Negative treatment: [Most recent](#) [Distinguished \(3\)](#) [All \(3\)](#)

6. In re Hanes

United States Bankruptcy Court, E.D. Virginia, Alexandria Division. • September 17, 1997 • 214 B.R. 786 • 1997 WL 702946

 10+ years

Depth of discussion Cited

Distinguished by [In re Baxter](#) Bankr.D.Dist.Col. October 6, 2004
 ...661, 71 L.Ed. 1158 (1927)Crosby v. Loudoun Nat'l Bank, 235 F.2d 540, 543 (4th Cir.1956)Milner v. Milner, 183 W.Va. 273, 395 S.E.2d 517, 521 (1990)Heine v. Newman, Tannenbaum, Helpert, Syracuse & Hirschtritt, 856 F.Supp. 190 (S.D.N.Y.1994)aff'd 50 F.3d 2 (2d Cir.1995) [Caldwell v. Hanes \(In re Hanes\), 214 B.R. 786, 825 \(Bankr.E.D.Va.1997\)](#)) That rule alone, however, does not suffice to protect the defendants from the claims of negligence asserted here, as the rule assumes the existence of an authentic power of attorney.However, it makes sense that a negligence claim ought...

Overruling Risk [Estate of Schneider v. Finmann](#) N.Y. June 17, 2010

A case you cited has potentially been negatively impacted by events or decisions in other litigation or proceedings.

[In re Hanes](#) United States Bankruptcy Court, E.D. Virginia, Alexandria Division. September 17, 1997
 ... regarding actions involving legal malpractice is that absent fraud, collusion, malicious acts or special circumstances, an attorney is not liable to third parties not in privity for harm caused by professional negligence. See, e.g., [Viscardi v. Lerner](#), 125 A.D.2d 662, 510 N.Y.S.2d 183 (1986); [Spivey v. Pulley](#),

138 A.D.2d 563, 526 N.Y.S.2d 145, 146 (1988). Under the privity rule, New York courts consistently hold that the beneficiaries of a trust cannot bring an action for legal malpractice against the attorneys for the trustee of the trust. See, e.g., *Weingarten v. Warren*, 753 F.Supp. 491, 496–97 (S.D.N.Y.1990) (court dismissed claim ...


[Estate of Schneider v. Finmann](#) N.Y. June 17, 2010

...Privity necessary to support a legal malpractice claim, or a relationship sufficiently approaching privity, exists between the personal representative of an estate and the estate planning attorney; abrogating *Deeb v. Johnson*, 170 A.D.2d 865, 566 N.Y.S.2d 688, ***Spivey v. Pulley*, 138 A.D.2d 563, 526 N.Y.S.2d 145**, *Viscardi v. Lerner*, 125 A.D.2d 662, 510 N.Y.S.2d 183, *Rossi v. Boehner*, 116 A.D.2d 636, 498 N.Y.S.2d 318 *McKinney's EPTL 11–3.2(b)*...

Negative treatment: [Most recent](#) [Distinguished \(1\)](#) [All \(3\)](#)

7. [Taliaferro v. Taliaferro](#)

Supreme Court of Kansas. • July 26, 1996 • 260 Kan. 573 • 921 P.2d 803

 10+ years


Depth of discussion  Cited

Distinguished by [Midwest Trust Co. v. Ong](#) Kan.App. January 18, 2013

...the 2002 Trust instrument effect a transfer of the house to the 2002 Trust?Unity contends that Norma partially amended or revoked the 1983 Trust by executing the warranty deed and thereby transferred the residence from the 1983 Trust to the 2002 Trust. Unity argues that our Supreme Court in ***Taliaferro v. Taliaferro*, 260 Kan. 573, 921 P.2d 803 (1996)**, recognized that a grantor of a revocable living trust has the authority to revoke a specific interest when the grantor possesses a general power of revocation. Unity essentially argues that because Norma was both grantor and trustee of the 1983...

8. [In re Estate of Zukerman](#)

Appellate Court of Illinois, First District, Sixth Division. • August 09, 1991 • 218 Ill.App.3d 325 • 578 N.E.2d 248

 10+ years

Depth of discussion  Cited


Distinguished by [In re Estate of Mendelson](#) Ill.App. 1 Dist. July 13, 1998

...requirement in the 1974 amendment that the remaindermen survive decedent, Evelyn Jackson had a vested remainder. Port asserts that a survivorship requirement cannot be implied in light of the "clear preference in Illinois law for vesting of remainders at the earliest possible date."One of the cases cited by Port, ***In re Estate of Zukerman*, 218 Ill.App.3d 325, 332, 161 Ill.Dec. 121, 578 N.E.2d 248 (1991)**, discusses the issue of vesting of an interest in an inter vivos trust:"The declaration of trust immediately creates an equitable interest in the beneficiary although the enjoyment of that interest is postponed...

Negative treatment: [Most recent](#) [Distinguished \(3\)](#) [All \(3\)](#)

9. Estate of McCredy

Superior Court of Pennsylvania. • December 23, 1983 • 323 Pa.Super. 268 • 470 A.2d 585


 10+ years

Depth of discussion  Cited

Distinguished by [In re Rosenfeld Foundation Trust](#) Pa.Com.Pl. July 31, 2006
...statute as stated in [In re Sky Trust](#), 868 A.2d 464, 483 (Pa.Super.2005)where, as in the present case, a testator vests a fiduciary with discretion to retain assets, the fiduciary is not thereby excused from the duty of making the retention decision prudently"The Rosenfelds invoke The [Estate of McCredy, 323 Pa.Super. 268, 470 A.2d 585 \(1983\)](#) to support their argument that the trust instrument authorizes retention of the Pep Boys stock.95 That case, however, is distinguishable. The document in [McCredy](#) creating a charitable trust gave the individual trustee, who had been the settlor's trusted investment...

10. Citizens' Loan & Trust Co. v. Herron

Supreme Court of Indiana. • April 25, 1917 • 186 Ind. 421 • 115 N.E. 941


 10+ years

Depth of discussion  Cited

Distinguished by [Murphy v. Trustee of Star Financial Bank](#) Ind.App. January 13, 2020
...interest in the Trust, there can be no per stirpes distribution because the condition of survival negates the right of representation inherent in a per stirpes distribution.1 FN1. In support of their argument that the Distribution Provision of the Living Trust Agreement is unambiguous, the Kelker Children rely on [Citizens' Loan & Trust Co. v. Herron, 186 Ind. 421, 115 N.E. 941 \(1917\)](#), a decision which addressed the vesting of certain interests in trust instruments. In [Citizens' Loan](#), father created a testamentary trust for the benefit of his six children. [Id. at 941-42](#) The trust stipulated that the corpus would...

11. Peters Creek United Presbyterian Church v. Washington Presbytery of Pennsylvania

Commonwealth Court of Pennsylvania. • April 30, 2014 • 90 A.3d 95 • 2014 WL 1810581

 10+ years

Depth of discussion  Cited

Trial Court Orders (0)

Statutes (1)

 **1. § 1104. Fiduciary duties**

29 USCA § 1104 • Effective: December 29, 2022 • United States Code Annotated • Title 29. Labor

Depth of discussion  Cited

Proposed Legislation by [2023 CONG US S 5174](#)
118th CONGRESS, 2nd Session, (Sep. 25, 2024), VERSION: Introduced in Senate, PROPOSED
ACTION: Amended

[See all history \(842\)](#)

Regulations (0)

Secondary Sources (0)

Administrative Decisions & Guidance (0)

Unverified citations (0)

“ 3. Quotation analysis

Use Quotation analysis to compare quotations and surrounding context from the analyzed document to the language in the cited documents on Westlaw.

Key: **differences**

1.

Quotation from the analyzed document Differences

...the intention to create a trust is clearly expressed. No particular form of words is necessary to create a trust, and the use or nonuse of the words "trust" and "trustee" is not controlling [Citizens' Loan & Trust Co. v. Herron, 186 Ind. 421 \(1917\)](#) . For instance, the Appellate Court of Illinois in

“ "In re Estate of **Zukerman** "

stated that no particular form of words is necessary to create a trust if the writing makes clear the existence of a trust [In re Estate of Zukerman, 218 Ill.App.3d 325 \(1991\)](#) . Similarly, the Court of Appeals of Texas in " [The Episcopal Church v. Salazar](#)" noted that no particular words are required...

🚩 In re Estate of Zukerman

Appellate Court of Illinois, First District, Sixth Division. • August 09, 1991 • 218 Ill.App.3d 325

“ In re Estate of

ZukermanIll.App. 1 Dist.,1991.IN RE ESTATE OF ZUKERMANNo. 1–90–3009.Aug. 9, 1991.Justice LaPORTA delivered the opinion of the court:The subject of this appeal is an order entered by the circuit court of Cook County which found that Louis Rotfeld, deceased, held certain bonds in trust for the benefit...

2.

Quotation from the analyzed document Differences

 **The Episcopal Church v. Salazar**

Court of Appeals of Texas, Fort Worth. • April 05, 2018 • 547 S.W.3d 353

...For instance, the Appellate Court of Illinois in "[In re Estate of Zukerman](#)" stated that no particular form of words is necessary to create a trust if the writing makes clear the existence of a trust [In re Estate of Zukerman, 218 Ill.App.3d 325 \(1991\)](#) . Similarly, the Court of Appeals of Texas in

“ **"The Episcopal Church v. Salazar"**

noted that no particular words are required to create a trust if there is reasonable certainty as to the intended property, the subject to which the trust obligation relates, [and the beneficiary The Episcopal Church v. Salazar, 547 S.W.3d 353 \(2018\)](#) . Additionally, the Supreme Court of Pennsylvania...

“ **The Episcopal Church v.**

SalazarTex.App.-Fort Worth, 2018State Civil ProcedureOrganizationHouse of WorshipNon-Profit OrganizationsReligious Institution or PracticeReligious InstitutionControl or Possession Over PropertyEcclesiastical Abstention DoctrineResolution of Religious ControversyRequiredWas court required to defer...

3.

Quotation from the analyzed document

The Intersection of Faith and Law: Understanding How God's Trust and the Role of Trustees Intersect with Man's Law So, this article is something I have wanted to do. But, because of Anna Von Reitz, I did it sooner than planned. She made a response to my article,

“ **"A Legal Trust Analysis of the Declaration: Sovereign States as Parties to America's Founding Contract"**

that you can read [linked here](#). Her response was like this and I quote, "beware of British "interpretations" and "redefinitions" of things. Just because something "can" - with a shove-- be read as a trust indenture doesn't mean it is a trust indenture. As the double-speaking weasel admits in the...



Quick Check was unable to match this quotation to authority on Westlaw.

4.

Quotation from the analyzed document

...I have wanted to do. But, because of Anna Von Reitz, I did it sooner than planned. She made a response to my article, "A Legal Trust Analysis of the Declaration: Sovereign States as Parties to America's Founding Contract" that you can read linked here. Her response was like this and I quote,

“beware of British "interpretations" and "redefinitions" of things. Just because something "can" - with a shove-- be read as a trust indenture doesn't mean it is a trust indenture. As the double-speaking weasel admits in the first paragraph-- such an intent must be clearly expressed, and it isn't. So the bastard is knowingly spinning out this whole"

supposition" in hopes of getting this idea in people's heads, knowing full well that it isn't a trust indenture and can't be considered one for lack of any expressed explicit intent to create such a trust. More British bunko and he even admits it --- though most people won't see that part of it,...



Quick Check was unable to match this quotation to authority on Westlaw.

5.

Quotation from the analyzed document

...that no particular words are required to create a trust if there is reasonable certainty as to the intended property, the subject to which the trust obligation relates, [and the beneficiary The Episcopal Church v. Salazar, 547 S.W.3d 353 \(2018\)](#) .
Additionally, the Supreme Court of Pennsylvania in

“ **"Peters Creek United Presbyterian Church v. Washington Presbytery of Pennsylvania"**

emphasized that no particular form of words or conduct is required to manifest the intention to create a trust, and the absence of the terms "trust" and "trustee" does not prevent a declaration of trust from being sufficient Peters Creek United Presbyterian Church v. Washington Presbytery of...



Quick Check was unable to match this quotation to authority on Westlaw.

6.

Quotation from the analyzed document

...the United States, which implies a fiduciary responsibility similar to that of trustees [United States v. Nordean, Not Reported in Fed. Supp. \(2022\)](#).
And, you also have the Congression Record March 17, 1933, Pg 5321 Linked here where Mr. James Traficant stated on the Congression Floor the following,

“ **“Members of Congress are official trustees presiding over the greatest re-organization of any bankrupt entity in world history, the U.S. Government.”**

The United States was started in bankruptcy in 1776, we did not win the Revolution, there was a truce. You should know about the treaty of Paris 1783. And, who loaned the gold to the states to repay the war debt? So, from this point own people can read the rest of the article and people can judge...



Quick Check was unable to match this quotation to authority on Westlaw.

7.

Quotation from the analyzed document

...using entrusted resources wisely, with accountability to God as the ultimate authority. Similarly, the Psalms affirm that the earth belongs to the Lord (Psalm 24:1), emphasizing that humanity's stewardship is conducted under divine oversight. Additionally, 1 Corinthians 4:2 reinforces this theme:

“ **Moreover it is required in stewards, that a man be found faithful**”

(KJV), further highlighting the expectation of accountability in both theological and legal contexts. Natural law theorists such as Thomas Aquinas and William Blackstone have further highlighted the connection between divine trust and human legal systems. Blackstone, in his Commentaries on the...



Quick Check was unable to match this quotation to authority on Westlaw.

8.

Quotation from the analyzed document

...the structure of legal trusts, emphasizing responsibility, accountability, and fidelity to the interests of the one who grants the trust. One of the most significant expressions of divine trust is found in Genesis 1:28, commonly referred to as the Dominion Mandate. In this verse, God commands,

“ **Be fruitful, and multiply, and replenish the earth, and subdue it: and have dominion over the fish of the sea, and over the fowl of the air, and over every living thing that moveth upon the earth**”

(Genesis 1:28, KJV). The Hebrew word for "dominion" used here is *radah* (רָדָה), which signifies rulership, but within the context of stewardship rather than exploitation. This term's emphasis on responsible rulership parallels the duty of care in legal trust relationships, where trustees must...



Quick Check was unable to match this quotation to authority on Westlaw.

9.

Quotation from the analyzed document

...such as those found in the Midrash Kohelet Rabbah, emphasize that this dominion comes with a moral responsibility to care for and preserve creation. Stewardship, or the duty to manage entrusted resources, is a recurring theme throughout the Bible. The Psalms reiterate that the earth belongs to God:

“**The earth is the Lord's, and the fulness thereof; the world, and they that dwell therein**”

(Psalm 24:1, KJV). This verse underlines the idea that humanity is not the ultimate owner but a caretaker of God's creation. Theological stewardship thus reflects the trustee's role in legal trusts, wherein trustees manage assets they do not own for the benefit of others. The Parable of the Talents...



Quick Check was unable to match this quotation to authority on Westlaw.

10.

Quotation from the analyzed document

...them to manage and increase those resources in his absence. Upon his return, the master holds each servant accountable for how they handled what was entrusted to them. Jesus teaches through this parable that faithfulness in stewardship is rewarded, while neglect or misuse results in judgment:

“**For unto every one that hath shall be given, and he shall have abundance: but from him that hath not shall be taken away even that which he hath**”

(Matthew 25:29, KJV). The Greek word for steward, *oikonomos* (οἰκονόμος), directly corresponds to the concept of a trustee, highlighting responsibility, diligence, and accountability. Further emphasizing this connection, the covenantal relationship between God and His people can be seen as a divine...



Quick Check was unable to match this quotation to authority on Westlaw.

11.

Quotation from the analyzed document

...commandments. The Hebrew term for covenant, berith (בְּרִית), carries connotations of both legal and spiritual obligation, akin to the terms of a trust agreement. The New Testament further develops the concept of trust through the teachings of the apostles. Paul, writing to the Corinthians, states,

“**Moreover it is required in stewards, that a man be found faithful**”

(1 Corinthians 4:2, KJV). The Greek term pistos (πιστός), meaning faithful or trustworthy, emphasizes the importance of fidelity in all aspects of stewardship. Paul often uses this language to describe both spiritual leaders and believers who are entrusted with the mysteries of God (1 Corinthians...



Quick Check was unable to match this quotation to authority on Westlaw.

12.

Quotation from the analyzed document

...with the mysteries of God (1 Corinthians 4:1). The theological framework of trust is further reinforced by the concept of divine judgment. Just as legal trustees are held accountable to the grantor and beneficiaries, stewards in the Bible are ultimately accountable to God. Romans 14:12 states,

“**So then every one of us shall give account of himself to God**”

(KJV). This underscores the moral weight of stewardship, linking it directly to eternal consequences and rewards. The Hebrew word paqad (פָּקַד), which means to appoint or entrust responsibility, appears frequently in contexts where leaders or stewards are given oversight. For example, in Numbers...



Quick Check was unable to match this quotation to authority on Westlaw.

13.

Quotation from the analyzed document

...to eternal consequences and rewards. The Hebrew word *paqad* (פ.ק.ד), which means to appoint or entrust responsibility, appears frequently in contexts where leaders or stewards are given oversight. For example, in Numbers 27:18-20, God instructs Moses to appoint Joshua as a leader over Israel:

“**And the Lord said unto Moses, Take thee Joshua the son of Nun, a man in whom is the spirit, and lay thine hand upon him... And thou shalt put some of thine honour upon him, that all the congregation of the children of Israel may be obedient**”

(KJV). This appointment reflects both authority and responsibility, paralleling the role of a trustee in legal structures. The dual role of humanity as both trustee and beneficiary in God's creation is evident throughout Scripture. This concept aligns with the legal framework of trust law, where...



Quick Check was unable to match this quotation to authority on Westlaw.

14.

Quotation from the analyzed document

...standing to inherit certain promises under the terms of the trust. While humanity is charged with the care of the earth, believers also receive the promise of an eternal inheritance through Christ. Hebrews 1:2 declares that God has appointed His Son as “heir of all things,” and Romans 8:17 states,

“**And if children, then heirs; heirs of God, and joint-heirs with Christ...**”

(KJV). This inheritance is both spiritual and physical, reinforcing the interconnected roles of stewardship and blessing. In conclusion, the biblical foundations of trust highlight a profound connection between divine stewardship and human responsibility. Through mandates, parables, and covenants,...



Quick Check was unable to match this quotation to authority on Westlaw.

15.

Quotation from the analyzed document

...trust law, where an individual is granted the right to inherit and benefit from assets entrusted by the grantor. This concept is revealed through Scripture, which consistently emphasizes Christ's authority, inheritance, and fulfillment of God's redemptive plan for the world. Hebrews 1:1-2 declares,

“**God, who at sundry times and in divers manners spake in time past unto the fathers by the prophets, Hath in these last days spoken unto us by his Son, whom he hath appointed heir of all things, by whom also he made the worlds”**

(KJV). The term “heir” (klēronomos, κληρονόμος) in the Greek indicates someone who inherits by legal right, further demonstrating the trust structure inherent in God's divine plan. Jesus' authority as the heir aligns with the legal principle of inheritance rights, where the beneficiary is granted...



Quick Check was unable to match this quotation to authority on Westlaw.

16.

Quotation from the analyzed document

...full control and entitlement to the assets entrusted by the grantor. As the heir, Jesus receives authority over all things in heaven and on earth (Matthew 28:18), making Him the culmination of God's promises. The Old Testament anticipates this inheritance, as seen in Psalm 82:8, which states,

“**Arise, O God, judge the earth: for thou shalt inherit all nations”**

(KJV). The Hebrew term for inherit in this context is nachal (נָחַל), signifying the receipt of an inheritance or possession by divine appointment. This prophetic declaration foreshadows Christ's eventual reign and ownership of the world, reinforcing the role of Jesus as the divine beneficiary of...



Quick Check was unable to match this quotation to authority on Westlaw.

17.

Quotation from the analyzed document

...of God's creation. Christ's fulfillment of God's trust is accomplished through His life, death, and resurrection. The redemptive work of Christ restores the broken relationship between God and humanity, fulfilling the responsibilities entrusted to Him by the Father. In John 17:4, Jesus prays,

“I have glorified thee on the earth: I have finished the work which thou gavest me to do”

(KJV), demonstrating that He faithfully executed the divine trust placed upon Him. Through this fulfillment, Jesus becomes the mediator of a new covenant, establishing a pathway for believers to share in His inheritance. This role mirrors both the responsibilities of a trustee, who faithfully...



Quick Check was unable to match this quotation to authority on Westlaw.

18.

Quotation from the analyzed document

...of a trustee, who faithfully administers the terms of a trust, and the inheritance rights of a primary beneficiary. As mediator, Jesus ensures the fulfillment of God's promises while securing the eternal inheritance for those united with Him through faith. Hebrews 9:15 affirms this, stating,

“And for this cause he is the mediator of the new testament, that by means of death, for the redemption of the transgressions that were under the first testament, they which are called might receive the promise of eternal inheritance”

(KJV). Here, the concept of inheritance (klēronomia, κληρονομία) extends to all who are united with Christ through faith. Believers are thus made co-heirs with Christ. Paul highlights this in Romans 8:17: “And if children, then heirs; heirs of God, and joint-heirs with Christ; if so be that we...



Quick Check was unable to match this quotation to authority on Westlaw.

19.

Quotation from the analyzed document

...the first testament, they which are called might receive the promise of eternal inheritance” (KJV). Here, the concept of inheritance (klēronomia, κληρονομία) extends to all who are united with Christ through faith. Believers are thus made co-heirs with Christ. Paul highlights this in Romans 8:17:

“**And if children, then heirs; heirs of God, and joint-heirs with Christ; if so be that we suffer with him, that we may be also glorified together**”

(KJV). This co-heirship underscores the profound relationship between divine stewardship and grace. Through faith, believers partake in the benefits of Christ’s inheritance, becoming both trustees of God’s ongoing work on earth and beneficiaries of His promises. Additionally, Ephesians 1:10-11...



Quick Check was unable to match this quotation to authority on Westlaw.

20.

Quotation from the analyzed document

...divine stewardship and grace. Through faith, believers partake in the benefits of Christ’s inheritance, becoming both trustees of God’s ongoing work on earth and beneficiaries of His promises. Additionally, Ephesians 1:10-11 emphasizes that God’s ultimate plan is to unite all things in Christ:

“**That in the dispensation of the fulness of times he might gather together in one all things in Christ, both which are in heaven, and which are on earth; even in him: In whom also we have obtained an inheritance...**”

(KJV). The phrase “fulness of times” points to the divine orchestration of history, structured like a trust administration, with Jesus fulfilling both the roles of trustee and beneficiary. As the trustee, Jesus manages and mediates God’s plan for redemption, ensuring the orderly execution of divine...



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...Jesus Christ as the ultimate heir of all creation, making Him the principal beneficiary of God's divine trust. This concept is revealed through Scripture, which consistently emphasizes Christ's authority, inheritance, and fulfillment of God's redemptive plan for the world. Hebrews 1:1-2 declares,

“**God, who at sundry times and in divers manners spake in time past unto the fathers by the prophets, Hath in these last days spoken unto us by his Son, whom he hath appointed heir of all things, by whom also he made the worlds**”

(KJV). The term “heir” (klēronomos, κληρονόμος) in the Greek indicates someone who inherits by legal right, further demonstrating the trust structure inherent in God's divine plan. As the heir, Jesus receives authority over all things in heaven and on earth (Matthew 28:18), making Him the...



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Quotation from the analyzed document

...further demonstrating the trust structure inherent in God's divine plan. As the heir, Jesus receives authority over all things in heaven and on earth (Matthew 28:18), making Him the culmination of God's promises. The Old Testament anticipates this inheritance, as seen in Psalm 82:8, which states,

“**Arise, O God, judge the earth: for thou shalt inherit all nations**”

(KJV). This prophetic declaration foreshadows Christ's eventual reign and ownership of the world, reinforcing the role of Jesus as the divine beneficiary of God's creation. Christ's fulfillment of God's trust is accomplished through His life, death, and resurrection. The redemptive work of Christ...



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...of God's creation. Christ's fulfillment of God's trust is accomplished through His life, death, and resurrection. The redemptive work of Christ restores the broken relationship between God and humanity, fulfilling the responsibilities entrusted to Him by the Father. In John 17:4, Jesus prays,

“**I have glorified thee on the earth: I have finished the work which thou gavest me to do**”

(KJV), demonstrating that He faithfully executed the divine trust placed upon Him. Through this fulfillment, Jesus becomes the mediator of a new covenant, establishing a pathway for believers to share in His inheritance. Hebrews 9:15 affirms this, stating, “And for this cause he is the mediator of...



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...the work which thou gavest me to do” (KJV), demonstrating that He faithfully executed the divine trust placed upon Him. Through this fulfillment, Jesus becomes the mediator of a new covenant, establishing a pathway for believers to share in His inheritance. Hebrews 9:15 affirms this, stating,

“**And for this cause he is the mediator of the new testament, that by means of death, for the redemption of the transgressions that were under the first testament, they which are called might receive the promise of eternal inheritance**”

(KJV). Here, the concept of inheritance (klēronomia, κληρονομία) extends to all who are united with Christ through faith. Believers are thus made co-heirs with Christ. Paul highlights this in Romans 8:17: “And if children, then heirs; heirs of God, and joint-heirs with Christ; if so be that we...



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Quotation from the analyzed document

...the first testament, they which are called might receive the promise of eternal inheritance” (KJV). Here, the concept of inheritance (klēronomia, κληρονομία) extends to all who are united with Christ through faith. Believers are thus made co-heirs with Christ. Paul highlights this in Romans 8:17:

“**And if children, then heirs; heirs of God, and joint-heirs with Christ; if so be that we suffer with him, that we may be also glorified together**”

(KJV). This co-heirship underscores the profound relationship between divine stewardship and grace. Through faith, believers partake in the benefits of Christ’s inheritance, becoming both trustees of God’s ongoing work on earth and beneficiaries of His promises. Additionally, Ephesians 1:10-11...



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...divine stewardship and grace. Through faith, believers partake in the benefits of Christ’s inheritance, becoming both trustees of God’s ongoing work on earth and beneficiaries of His promises. Additionally, Ephesians 1:10-11 emphasizes that God’s ultimate plan is to unite all things in Christ:

“**That in the dispensation of the fulness of times he might gather together in one all things in Christ, both which are in heaven, and which are on earth; even in him: In whom also we have obtained an inheritance...**”

(KJV). The phrase “fulness of times” points to the divine orchestration of history, with Jesus at the center of God’s purposes. The implications of Christ as the ultimate beneficiary are both theological and practical. Spiritually, it affirms that all creation is destined to be brought under...



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Quotation from the analyzed document

...caring for God's creation while simultaneously being recipients of God's promises and blessings. This dual role reflects the inherent complexity and importance of stewardship in both spiritual and legal contexts. The responsibility of humanity as trustees is made evident in Psalm 8:6, which states,

“**Thou madest him to have dominion over the works of thy hands; thou hast put all things under his feet**”

(KJV). The Hebrew word *radah* (רָדָה), translated as "dominion," indicates a responsibility to govern and oversee creation, not exploit it. This responsibility mirrors the legal duty of care, where trustees must manage trust assets responsibly to prevent harm or misuse, ensuring the well-being of...



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Quotation from the analyzed document

...of both the property and the beneficiaries. This responsibility mirrors the fiduciary duties found in legal trust law, where trustees must act in the best interests of the trust property and beneficiaries. From the beginning, humanity was given stewardship over the earth, as seen in Genesis 2:15:

“**And the Lord God took the man, and put him into the garden of Eden to dress it and to keep it**”

(KJV). The term *shamar* (שָׁמַר), meaning to guard or protect, underscores the duty of care that trustees must exercise. This concept aligns with modern legal obligations for trustees to safeguard trust assets from harm or misuse. However, humanity's stewardship was compromised by the Fall, as...



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...for faithful stewardship through Jesus Christ. This theological concept parallels the legal restoration of trust roles, where accountability and responsibility are reestablished after breaches of trust through corrective measures and renewed commitments. Romans 8:19-21 speaks to this restoration:

“**For the earnest expectation of the creature waiteth for the manifestation of the sons of God... Because the creature itself also shall be delivered from the bondage of corruption into the glorious liberty of the children of God**”

(KJV). Through Christ, humanity is not only restored to its role as trustees but also elevated to the status of co-heirs. This dual role reflects the balance seen in legal trust structures, where trustees manage present resources while simultaneously maintaining rights to future inheritance....



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...maintaining rights to future inheritance. Believers are entrusted with stewardship responsibilities that demand faithfulness in their current tasks, while also anticipating the full realization of God's promises in eternity. Paul emphasizes this dual inheritance in Ephesians 2:10, stating,

“**For we are his workmanship, created in Christ Jesus unto good works, which God hath before ordained that we should walk in them**”

(KJV). The Greek word *klēronomos* (κληρονόμος), meaning heir, highlights that believers share in the inheritance promised through Christ. This shared inheritance is both spiritual and physical. As trustees, believers are called to manage the resources of God's creation responsibly, demonstrating...



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...This parable explicitly illustrates fiduciary accountability, where faithful performance in managing entrusted resources is rewarded with greater trust and responsibility. Similarly, legal trustees are rewarded with continued duties and trust when they demonstrate integrity and competence.

“**Blessed is that servant, whom his lord when he cometh shall find so doing**”

(KJV). Here, Jesus teaches that stewardship is rewarded with greater trust and responsibility, paralleling legal principles where faithful trustees are often entrusted with more significant duties. Theological stewardship emphasizes that all resources ultimately belong to God. Psalm 24:1 proclaims,...



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...(KJV). Here, Jesus teaches that stewardship is rewarded with greater trust and responsibility, paralleling legal principles where faithful trustees are often entrusted with more significant duties. Theological stewardship emphasizes that all resources ultimately belong to God. Psalm 24:1 proclaims,

“**The earth is the Lord's, and the fulness thereof; the world, and they that dwell therein**”

(KJV). Humans, therefore, act as caretakers rather than owners, a principle also reflected in trust law, where trustees manage assets they do not own. In legal terms, this dual role can be complex. Trustees must balance their duties to manage resources with the understanding that they may also be...



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Quotation from the analyzed document

...be beneficiaries. Courts have established strict guidelines to prevent conflicts of interest, ensuring that trustees prioritize the overall well-being of the trust. Similarly, Scripture warns against selfishness and exploitation in stewardship roles. Isaiah 56:11 describes unfaithful leaders as

“greeting dogs which can never have enough,”

warning against trustees who seek personal gain. Finally, the promise of eternal inheritance defines humanity's beneficiary status in God's trust. Hebrews 1:2 declares that Christ is appointed “heir of all things,” while Romans 8:17 affirms, “If children, then heirs; heirs of God, and joint-heirs...



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34.

Quotation from the analyzed document

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“If children, then heirs; heirs of God, and joint-heirs with Christ”

(KJV). Through faith, believers become beneficiaries of God's promises, including eternal life and spiritual restoration. Humanity's dual role as both trustee and beneficiary in God's divine plan highlights the significance of faithful stewardship. By fulfilling their responsibilities with...



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Quotation from the analyzed document

...the Holy Spirit works to sustain the Church and equip believers to fulfill their stewardship responsibilities. In this role, the Spirit provides both the direction and the means to carry out God's purposes in the world. In John 14:26, Jesus describes the Holy Spirit as the Comforter and teacher:

“**But the Comforter, which is the Holy Ghost, whom the Father will send in my name, he shall teach you all things, and bring all things to your remembrance, whatsoever I have said unto you**”

(KJV). The Greek term *paraklētos* (παράκλητος), translated as Comforter or Advocate, signifies one who comes alongside to provide support and guidance. This role mirrors fiduciary duties of loyalty and care, where trustees provide ongoing support to ensure that the terms and obligations of a trust...



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Quotation from the analyzed document

...of inheritance, a role similar to that of a trustee guaranteeing the integrity of a trust. Just as legal trustees protect trust assets and ensure compliance with trust terms, the Holy Spirit safeguards the believer's inheritance by sealing and affirming God's promises. Ephesians 1:13-14 declares,

“**In whom ye also trusted, after that ye heard the word of truth, the gospel of your salvation: in whom also after that ye believed, ye were sealed with that holy Spirit of promise, Which is the earnest of our inheritance until the redemption of the purchased possession...**”

(KJV). The term *arrabōn* (ἀρραβών), meaning pledge or guarantee, emphasizes the Holy Spirit's role in assuring believers of their future inheritance. Throughout Scripture, the Holy Spirit's guidance is closely linked to the concept of stewardship. The Spirit equips believers with spiritual gifts...



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37.

Quotation from the analyzed document

...role in assuring believers of their future inheritance. Throughout Scripture, the Holy Spirit's guidance is closely linked to the concept of stewardship. The Spirit equips believers with spiritual gifts that enable them to serve God and others effectively. In 1 Corinthians 12:4-7, Paul writes,

“**Now there are diversities of gifts, but the same Spirit. And there are differences of administrations, but the same Lord. And there are diversities of operations, but it is the same God which worketh all in all. But the manifestation of the Spirit is given to every man to profit withal**”

(KJV). The term *oikonomia* (οἰκονομία), meaning administration or stewardship, highlights the orderly management of resources and responsibilities entrusted to believers through the Spirit. This parallels legal administration in trust law, where trustees are tasked with managing and allocating...



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38.

Quotation from the analyzed document

...the Church by providing wisdom and discernment to its leaders. This parallels legal oversight, where trustees monitor and provide strategic guidance to ensure that trust resources are used responsibly and according to the trust's purpose. In Acts 20:28, Paul exhorts the elders of the Church:

“**Take heed therefore unto yourselves, and to all the flock, over the which the Holy Ghost hath made you overseers, to feed the church of God, which he hath purchased with his own blood**”

(KJV). The Greek word *episkopos* (ἐπίσκοπος), translated as overseer, conveys the idea of spiritual guardianship, similar to the legal oversight provided by a trustee. Moreover, the Spirit works to sanctify believers, helping them grow in righteousness and fulfill their God-given duties. Galatians...



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Quotation from the analyzed document

...translated as overseer, conveys the idea of spiritual guardianship, similar to the legal oversight provided by a trustee. Moreover, the Spirit works to sanctify believers, helping them grow in righteousness and fulfill their God-given duties. Galatians 5:22-23 outlines the fruit of the Spirit:

“**But the fruit of the Spirit is love, joy, peace, longsuffering, gentleness, goodness, faith, Meekness, temperance: against such there is no law**”

(KJV). These virtues are essential for effective stewardship, guiding believers to act with integrity and care in all areas of life. Finally, the Holy Spirit empowers believers to carry out their mission with boldness and perseverance. In Acts 1:8, Jesus promises, “But ye shall receive power, after...



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...against such there is no law” (KJV). These virtues are essential for effective stewardship, guiding believers to act with integrity and care in all areas of life. Finally, the Holy Spirit empowers believers to carry out their mission with boldness and perseverance. In Acts 1:8, Jesus promises,

“**But ye shall receive power, after that the Holy Ghost is come upon you: and ye shall be witnesses unto me both in Jerusalem, and in all Judaea, and in Samaria, and unto the uttermost part of the earth”**

(KJV). The Spirit's empowerment ensures that believers have the strength and courage to fulfill their responsibilities as trustees of God's creation and witnesses to His truth. The Holy Spirit serves as both a trustee and guide, providing the resources, direction, and assurance necessary for...



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41.

Quotation from the analyzed document

...of loyalty, where trustees are appointed to act in the best interest of the beneficiaries, prioritizing their well-being over personal gain. It implies oversight, management, and accountability. o Biblical Example: In Numbers 27:18-20, God instructs Moses to appoint Joshua as the leader of Israel:

“**And the Lord said unto Moses, Take thee Joshua the son of Nun, a man in whom is the spirit, and lay thine hand upon him...**”

(KJV). Joshua's role involved stewardship and responsibility for the well-being of the nation. o Legal Comparison: A trustee appointed by a grantor holds a similar obligation to manage trust assets responsibly and in the best interest of the beneficiaries. o Paqad (פּוֹקֵד) would indeed have a...



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42.

Quotation from the analyzed document

...as those entrusted with divine responsibility are accountable to God. 2. Shamar (שָׁמַר): o Meaning: To guard, keep, or protect. This term highlights the duty of care, a critical responsibility of trustees in legal trusts. o Biblical Example: In Genesis 2:15, Adam is placed in the Garden of Eden

“to dress it and to keep it”

(KJV), indicating a duty to care for and protect creation. o Legal Comparison: Trustees are legally required to safeguard trust assets, ensuring they are not wasted or mismanaged. This reflects the fiduciary duty of care, emphasizing that both biblical and legal frameworks require active protection...



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43.

Quotation from the analyzed document

..."keep" (shamar) the Garden of Eden, indicating a responsibility to care for and protect it. Similarly, trustees are tasked with preserving trust property for the benefit of beneficiaries. Continuous Oversight Biblically, shamar implies ongoing, watchful oversight. In Psalm 121:4, it is said of God,

"Behold, he that keepeth (shamar) Israel shall neither slumber nor sleep."

This description of God as the ultimate guardian reflects the expectation of constant vigilance, a principle that parallels the legal requirement for trustees to actively monitor and safeguard trust property. In a fiduciary context, trustees cannot neglect their responsibilities. They must...



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44.

Quotation from the analyzed document

...and uphold that which has been entrusted—whether in a spiritual or legal context. 3. Oikonomos (οἰκονόμος): o Meaning: This Greek term means steward or manager. It emphasizes the trustee's role in managing resources for the benefit of another. o Biblical Example: Paul writes in 1 Corinthians 4:2,

“**Moreover it is required in stewards, that a man be found faithful**”

(KJV). The steward (oikonomos) is expected to act with integrity and accountability. o Legal Comparison: Trustees are bound by fiduciary duties to act faithfully, prudently, and in the best interest of the trust beneficiaries. Meaning: This Greek term, derived from oikos (house) and nemo (manage),...



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45.

Quotation from the analyzed document

...manager, or overseer of a household or resources. The oikonomos is entrusted with the management of another's property or affairs, emphasizing both authority and responsibility. This directly parallels the role of a trustee in legal contexts. Biblical Example: In 1 Corinthians 4:2, Paul emphasizes,

“**Moreover it is required in stewards (oikonomos), that a man be found faithful**”

(KJV). Paul likens Christian leaders to stewards, emphasizing their obligation to manage God's spiritual resources with integrity and accountability. This mirrors the trustee's duty to maintain accurate records and provide reports to beneficiaries, ensuring transparency and accountability in the...



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46.

Quotation from the analyzed document

...with resources to benefit others, echoing the principle that trustees are not owners of trust property but hold it in trust for beneficiaries. Another key example appears in Luke 12:42-44, where Jesus describes the faithful and wise steward (oikonomos) who manages his master's household well:

“**Blessed is that servant, whom his lord when he cometh shall find so doing**”

(KJV). This passage underscores that stewardship entails both authority and accountability, with rewards or consequences based on performance. Expanded Understanding: The concept of oikonomos was deeply embedded in Greek and Roman society, where stewards were essential figures in large households...



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Quotation from the analyzed document

...term to describe their own roles within the Church, recognizing that they were entrusted with the spiritual well-being of the community. In theological writings, the oikonomos was seen as a model of ethical governance. For example, in Titus 1:7, Paul instructs that an overseer (episkopos) must be

“**blameless, as the steward (oikonomos) of God,**”

reinforcing that both leadership and accountability are central to stewardship. Rabbinic and Early Christian Insights: While oikonomos is a Greek term, it is conceptually related to the Hebrew role of a shaliach (שליח), or an appointed agent, in Jewish law. A shaliach acted with delegated authority...



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48.

Quotation from the analyzed document

...is dismissed for mismanaging his master's resources. 4. Episkopos (ἐπίσκοπος): o Meaning: Often translated as overseer or guardian, this term describes one who supervises and protects, akin to a legal trustee. o Biblical Example: In Titus 1:7, Paul explains that an overseer (episkopos) must be

“blameless, as the steward of God”

(KJV). The overseer's role involves vigilance and faithful management of the resources entrusted to them. o Legal Comparison: Trustees act as guardians of the trust property, overseeing its administration according to the grantor's instructions. Meaning: This Greek term is often translated as...



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49.

Quotation from the analyzed document

...a person who supervises and protects others, which closely parallels the role of a trustee in legal trust law. The term emphasizes leadership, vigilance, and protective oversight, essential traits for managing responsibilities on behalf of others. Biblical Example: In Titus 1:7, Paul states,

“For a bishop (episkopos) must be blameless, as the steward of God; not self-willed, not soon angry, not given to wine, no striker, not given to filthy lucre”

(KJV). The overseer is expected to lead with integrity and manage the resources entrusted to them in accordance with God's commands. The stewardship aspect (oikonomia) is central to this role, requiring faithfulness in both spiritual and material responsibilities. Another example can be found in...



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...the resources entrusted to them in accordance with God's commands. The stewardship aspect (oikonomia) is central to this role, requiring faithfulness in both spiritual and material responsibilities. Another example can be found in Acts 20:28, where Paul instructs the elders of the Ephesian church:

“**Take heed therefore unto yourselves, and to all the flock, over the which the Holy Ghost hath made you overseers (episkopoi), to feed the church of God, which he hath purchased with his own blood**”

(KJV). Here, Paul highlights the role of the overseer as a guardian responsible for the welfare of the community, much like a trustee tasked with safeguarding trust assets. Expanded Understanding: The term episkopos was used in both secular and religious contexts in ancient Greece and Rome. It...



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51.

Quotation from the analyzed document

...Both roles require vigilance and the ability to make decisions that prioritize the well-being of others over personal interests. 5. Klēronomos (κληρονόμος):
 o Meaning: Heir or one who inherits. This term represents the beneficiary in a trust relationship.
 o Biblical Example: Romans 8:17 states,

“**And if children, then heirs; heirs of God, and joint-heirs with Christ...**”

(KJV). Believers inherit both spiritual and material blessings through their relationship with Christ.
 o Legal Comparison: The beneficiary of a trust is entitled to receive the benefits of the trust property according to the terms established by the grantor.
 Meaning: The Greek word klēronomos...



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52.

Quotation from the analyzed document

...fiduciary duties imposed on trustees. Biblical Foundations of Trust and Stewardship The concept of trust, as seen in Scripture, emphasizes the appointment of stewards who are responsible for managing resources on behalf of others. In Genesis 1:28, God entrusts humanity with dominion over the earth:

“**And God blessed them, and God said unto them, Be fruitful, and multiply, and replenish the earth, and subdue it: and have dominion over the fish of the sea, and over the fowl of the air, and over every living thing that moveth upon the earth”**

(KJV). This Dominion Mandate establishes a trust relationship between God and humanity, where humans are tasked with caring for creation as stewards. This trust relationship parallels legal trusteeship, emphasizing the responsibility to act on behalf of a higher authority. Just as trustees manage...



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Quotation from the analyzed document

...of Eden, reflecting a responsibility to maintain and safeguard creation. Legal trustees must exercise reasonable care, skill, and caution when managing trust property to prevent harm or waste. • Accountability: Biblical stewards are accountable to God for their actions. Romans 14:12 declares,

“**So then every one of us shall give account of himself to God**”

(KJV). In trust law, accountability is enforced through reporting requirements, audits, and legal oversight. Trustees must maintain accurate records and provide regular reports to beneficiaries, ensuring transparency and trust in their administration. Historical Integration of Faith and Law The...



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...and leaders are subject to scrutiny and must demonstrate that they have managed their responsibilities with integrity and prudence. Biblical Accountability Scripture emphasizes the need for stewards to be accountable to God and others. In Luke 16:1-2, Jesus tells the Parable of the Unjust Steward:

“**There was a certain rich man, which had a steward; and the same was accused unto him that he had wasted his goods...**”

(KJV). This parable underscores the principle that poor management and wastefulness lead to removal and judgment. Similarly, Matthew 25:30 emphasizes that unfaithful servants face severe consequences, illustrating the seriousness of accountability in stewardship. Paul reinforces the theme of...



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Quotation from the analyzed document

...principle that poor management and wastefulness lead to removal and judgment. Similarly, Matthew 25:30 emphasizes that unfaithful servants face severe consequences, illustrating the seriousness of accountability in stewardship. Paul reinforces the theme of accountability in Romans 14:12, stating,

“**So then every one of us shall give account of himself to God**”

(KJV). The expectation of divine judgment mirrors the legal requirement for trustees to report their actions and justify their decisions. Legal Accountability In trust law, trustees are held to strict standards of accountability. They are required to: • Maintain Accurate Records: Trustees must...



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56.

Quotation from the analyzed document

...legal systems that emphasize justice, fairness, and ethical responsibility. Biblical Foundations of Ethical Governance Biblical teachings stress that those entrusted with authority must exercise their power responsibly and in accordance with divine principles. In Micah 6:8, the prophet declares:

“**He hath shewed thee, O man, what is good; and what doth the Lord require of thee, but to do justly, and to love mercy, and to walk humbly with thy God?**”

(KJV). This verse highlights the importance of justice, humility, and mercy in leadership, values that are reflected in legal principles governing fiduciary duties. Similarly, Jesus' teachings on stewardship and servanthood emphasize the moral obligations of leaders to serve others. In Mark...



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Quotation from the analyzed document

...highlights the importance of justice, humility, and mercy in leadership, values that are reflected in legal principles governing fiduciary duties. Similarly, Jesus' teachings on stewardship and servanthood emphasize the moral obligations of leaders to serve others. In Mark 10:43-45, He states:

“**But so shall it not be among you: but whosoever will be great among you, shall be your minister: And whosoever of you will be the chiefest, shall be servant of all. For even the Son of man came not to be ministered unto, but to minister, and to give his life a ransom for many”**

(KJV). This principle of servant leadership has influenced modern legal concepts of fiduciary duty, where trustees are expected to act selflessly for the benefit of beneficiaries. Ethical governance, therefore, requires both moral integrity and a commitment to protecting those under one's care....



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58.

Quotation from the analyzed document

...several key areas of trust law and fiduciary responsibility: · Duty of Loyalty: Trustees must prioritize the interests of beneficiaries above their own. This principle reflects the biblical teaching that leaders and stewards must serve others with integrity. In Matthew 6:24, Jesus states,

“**No man can serve two masters,**”

emphasizing the importance of undivided loyalty. · Duty of Care: Trustees are required to manage trust assets with prudence and diligence, ensuring that they are preserved and used appropriately. This parallels the biblical mandate for stewardship, where individuals are called to safeguard...



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59.

Quotation from the analyzed document

...personal life, the concept of stewardship emphasizes responsible management of one's resources, talents, and time. Biblical teachings encourage individuals to use their resources wisely, recognizing that they are ultimately accountable to God for their actions. As Paul writes in 1 Corinthians 4:2,

“**Moreover it is required in stewards, that a man be found faithful**”

(KJV). Biblical Example: In Matthew 25:14-30 (Parable of the Talents), Jesus illustrates the importance of using resources wisely. The servant who invested and multiplied his talents was commended, while the one who buried his talent faced judgment. This story emphasizes personal accountability...



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60.

Quotation from the analyzed document

...Leadership In business and governance, leaders are entrusted with managing resources and making decisions that affect stakeholders. The biblical principle of servant leadership, exemplified by Jesus' teachings in Mark 10:43-45, calls for leaders to prioritize the well-being of those they serve.

“**Whosoever will be great among you, shall be your minister,**”

Jesus says, emphasizing that true leadership involves humility and service. Biblical Example: In 1 Kings 3:9-12, King Solomon prays for wisdom to govern the people justly. God grants his request, making Solomon a model of ethical leadership that prioritizes the well-being of others. Legal...



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61.

Quotation from the analyzed document

...reinforce these ethical expectations through fiduciary duties imposed on corporate directors and executives. These duties include: · Duty of Loyalty: Acting in the best interests of stakeholders and avoiding conflicts of interest. o Supporting Verses: § Proverbs 11:3

“**The integrity of the upright shall guide them: but the perverseness of transgressors shall destroy them.**”

(KJV) § Matthew 6:24 “No man can serve two masters: for either he will hate the one, and love the other; or else he will hold to the one, and despise the other. Ye cannot serve God and mammon.” (KJV) § Colossians 3:23 “And whatsoever ye do, do it heartily, as to the Lord, and not unto...



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62.

Quotation from the analyzed document

...· Duty of Loyalty: Acting in the best interests of stakeholders and avoiding conflicts of interest. o Supporting Verses: § Proverbs 11:3 “The integrity of the upright shall guide them: but the perverseness of transgressors shall destroy them.” (KJV) § Matthew 6:24

“**No man can serve two masters: for either he will hate the one, and love the other; or else he will hold to the one, and despise the other. Ye cannot serve God and mammon.**”

(KJV) § Colossians 3:23 “And whatsoever ye do, do it heartily, as to the Lord, and not unto men.” (KJV) o Biblical Example: In Genesis 39:7-12, Joseph demonstrates loyalty to his master, Potiphar, by refusing to betray his trust despite temptation from Potiphar's wife. Joseph's...



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...to betray his trust despite temptation from Potiphar's wife. Joseph's integrity exemplifies loyalty and faithfulness to both God and his earthly responsibilities. · Duty of Care: Exercising reasonable diligence and skill in decision-making. o Supporting Verses: § Proverbs 21:5

“**The thoughts of the diligent tend only to plenteousness; but of every one that is hasty only to want.**”

(KJV) § Ecclesiastes 9:10 “Whatsoever thy hand findeth to do, do it with thy might; for there is no work, nor device, nor knowledge, nor wisdom, in the grave, whither thou goest.” (KJV) § James 1:5 “If any of you lack wisdom, let him ask of God, that giveth to all men liberally, and...



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Quotation from the analyzed document

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This reflects the principle of exercising care and diligence in managing resources and responsibilities.

· Accountability: Maintaining transparency and providing accurate information to stakeholders. o

Supporting Verses: § Romans 14:12 “So then every one of us shall give...



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Quotation from the analyzed document

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Accountability: Maintaining transparency and providing accurate information to stakeholders. o

Supporting Verses: § Romans 14:12

“**So then every one of us shall give account of himself to God.**”

(KJV) § Luke 16:2 “And he called him, and said unto him, How is it that I hear this of thee? give an account of thy stewardship; for thou mayest be no longer steward.” (KJV) § 2 Corinthians 8:21 “Providing for honest things, not only in the sight of the Lord, but also in the sight of...



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...In Genesis 2:15, humanity is tasked with “dressing” and “keeping” the earth, reflecting a duty to protect and sustain natural resources. This biblical mandate aligns with modern efforts to promote sustainability and environmental conservation. Biblical Example: In Psalm 24:1, it is stated,

“**The earth is the Lord’s, and the fulness thereof; the world, and they that dwell therein**”

(KJV). This verse underscores humanity’s responsibility to care for the environment as stewards of God’s creation. Businesses, governments, and communities are increasingly adopting practices that reduce environmental impact, such as resource efficiency, waste reduction, and investment in renewable...



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72.

Quotation from the analyzed document

...a culture of integrity and responsibility. Legal professionals, corporate leaders, and policymakers can draw on principles of stewardship and accountability to address ethical challenges and foster trust. Biblical Example: In Proverbs 22:1, the Bible emphasizes integrity in business dealings:

“**A good name is rather to be chosen than great riches, and loving favour rather than silver and gold**”

(KJV). This verse highlights the value of ethical conduct and trustworthiness in leadership and commerce. Educational institutions and professional organizations can also play a role by offering training and resources on ethical leadership, corporate governance, and fiduciary responsibilities....



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73.

Quotation from the analyzed document

...across diverse contexts. Globalization, technological change, and social inequality create complex ethical dilemmas that require careful consideration of competing interests and values. Biblical Example: In James 1:27, the Bible highlights the importance of addressing social challenges:

“**Pure religion and undefiled before God and the Father is this, To visit the fatherless and widows in their affliction, and to keep himself unspotted from the world**”

(KJV). This verse calls for compassion and action in response to societal needs, reflecting both challenges and opportunities in applying faith-based ethics. However, these challenges also present opportunities for innovation and collaboration. By fostering dialogue between faith communities,...



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Quotation from the analyzed document

...the profound truth that ethical governance is not merely a legal obligation but a sacred duty. Through responsible stewardship, humanity honors the divine trust placed upon it, fostering a world that reflects God's justice, mercy, and righteousness. As Paul writes in 1 Corinthians 4:2,

“**Moreover it is required in stewards, that a man be found faithful**”

(KJV). Call to Action: Embrace faithful stewardship in all areas of life, recognizing that each person is entrusted with gifts and responsibilities to be used for the common good and to glorify God.



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Unverified citations (0)

☰ 4. Table of authorities

Table of authorities contains the full list of all the authority cited in the document. Use this to quickly review all the cited authority in a document.

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