# Beneficiary Support Toolkit for Trust Professionals

# Chapter 1 Resource

**Determining Communication Preferences**

It is important to understand communication preferences early on in a relationship with a beneficiary and family. Below, we have provided sample questions to ask when a trust is first founded to ensure you understand the beneficiary’s and family’s communication preferences.

**Sample Questions**

[ ]  Who should be get information about the trust? Is it just the beneficiary or are there supporters who should be included?

[ ]  Our trust materials may be technical and hard to read at times. What can we do to help make sure you understand the information we send you?

[ ]  What information should supporters know?

[ ]  How do you and any supporters like to receive information? Do you prefer talking in-person, by phone, in emails, or via Zoom or online meeting?

[ ]  There may be times when we need to get things done by a certain date – a deadline. What is the best way to remind you about deadlines?

[ ]  What should we know about how you communicate?

* Do you prefer to speak verbally – or do you communicate in another way?
* Do you need any language interpretation?
* Are there any things we can do to help make it easier for you to communicate with us?

[ ]  Is there anything else we can do to make sure we communicate well with each other?

Make sure to record details on communication preferences and insights in beneficiary notes that are available to all staff.

Consider writing an email or notification to any staff that may interact significantly with the beneficiary.

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Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

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