

Paved Roads and Good Intentions

Why loved ones may feel unprepared and how thoughtful planning supports them

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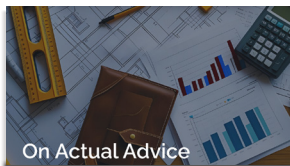
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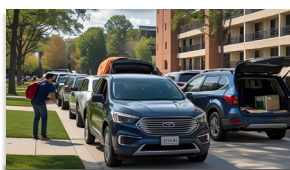
The summer after my grandfather Dwain passed away, my grandmother Ruth and I decided to take a road trip across the eastern half of the United States. Each stop along the way held a piece of her story with him. Our plan was to leave our hometown of Charleston, South Carolina, and head west to Montgomery, Alabama, where my grandparents grew up. From there, we would wind our way north through Tennessee, pausing in Virginia Beach to see the little house they lived in during my grandfather's Navy days, stopping for homemade jam in Pennsylvania Amish country, and continue all the way to Connecticut to visit our friends, Lou and Joan. Lou and my grandfather served together in the Navy band, and our two families formed a close bond when they were stationed overseas.

Our trip would eventually end in Long Island, New York, where we met my paternal grandmother before heading to the Outer Banks for a family reunion.

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We packed my grandmother's powder blue 1989 Lincoln Town Car to the brim the evening before we left. If you have never seen an older Town Car, imagine the Batmobile if Batman preferred a leather top, wood paneling, and a gear shifter the size of a small baseball bat. As we backed out of the driveway, my hands already digging for snacks, my grandmother reached across me, opened the glovebox, and placed a wrinkled Rand McNally in my lap.

I was going to navigate our entire trip. There was just one small problem. I was ten years old and certainly no Magellan.

Looking back, my grandmother was not wrong to trust me. I unfolded that oversized paper map with all the confidence in the world, even turning it sideways and upside down just to figure out which direction we were supposed to go. Despite my best efforts, we still found ourselves turned around on unfamiliar roads more than once.

Where Families Get Stuck, Despite the Best Intentions

We see this same pattern in estate planning. Families often feel secure in the plan they have created, yet the person placed in the trustee or executor

seat may not be prepared for the reality of the role. A spouse or adult child may suddenly find themselves navigating complex financial decisions, legal responsibilities, and sensitive family dynamics during a time that is already filled with emotion. It can feel like being asked to take on a job you have never done before without a training manual or a clear map to follow. Even the most capable and well-intentioned person can feel overwhelmed when the terrain is unfamiliar.

This is why we often ask prospective clients a simple but important question:

"If something happened to you tomorrow, would your trusted friend or family member truly be able to navigate what you have built?"

Many families name a spouse, adult child, or another relative out of love, habit, or convenience. It feels natural. Yet the role can place them in a high stress and conflict prone position. A grieving spouse may suddenly have to handle probate, manage distributions, communicate with beneficiaries, and understand finances or taxes they may not have been involved with during the marriage. For many, this is entirely unfamiliar territory.

Adult children often face their own challenges. They may have their own families and demanding careers. They may not understand the tax implications, investment risks, or trust provisions they are expected to interpret. Old sibling dynamics can surface in an instant, especially if distributions or responsibilities feel uneven or unclear.

The truth is that the trustee or executor role can force loved ones into situations they never anticipated. They may need to say no to siblings or other family members, mediate disputes, and manage deadlines and paperwork at precisely the moment they feel least equipped to do so. And through no fault of their own, they may not recognize opportunities to reduce taxes or preserve value, simply because this is not work they have ever had to do before.

How a Professional Fiduciary Guides the Path Forward

This is where partnering with an experienced fiduciary, like Truxton, can provide real support. The phrase corporate fiduciary can sound cold or distant, yet our team is anything but. We bring together attorneys, CPAs, CFAs, and experienced trust professionals who understand the technical details of administration and the emotional complexity that families often face. We know that each family operates differently, and our role is to help interpret and implement the plan in a way that feels fair and transparent. When decisions or distribution requests arise, we help navigate those conversations with care, which keeps family members from feeling caught in the middle.

A corporate fiduciary handles the estate administration, guides families through the probate process, manages the trust assets with professional oversight, and brings consistency and clarity to decisions. We provide structure and continuity during a time when families need both.

The goal is not to remove family from the process. It is to protect relationships, prevent unnecessary conflict, and ensure the estate and trust plan is carried out with maximum efficiency. It allows spouses and adult children to focus on healing and unity rather than paperwork and pressure. Most importantly, it honors the thoughtful planning of the person who handed you the map.

As you think about the path you want to leave for the people you love, it can be helpful to consider whether naming a professional trustee or executor would bring your family the clarity and support they will need. For many families, partnering with a corporate fiduciary provides the structure and continuity that keeps relationships intact and ensures the plan you created is carried out with care. If this is something you would like to explore, our team is always ready to talk through what that might look like for your family.

Good intentions matter. But so does the road you leave for the people you love. ■