Ethics Issues Facing Trust and Estate Lawyers

This interactive program uses hypotheticals to explore ethics issues likely to face lawyers involved in trust and estate planning and administration. Among other things, the program will focus on: defining the "clients" in multigenerational family and joint representation settings; conflicts during trust and estate planning, between clients' interests (including assisting one client in disinheriting another client) and between clients and their lawyers (including dealing with impaired clients); unauthorized practice of law and multijurisdictional practice issues involved in trust and estate planning; privilege issues (including the impact of family members' and agents' participation in privileged communications); lawyers' liability to non-clients for negligent estate planning; conflicts arising during the administration process (including properly characterizing the "client" when representing an executor or trustee); privilege ownership after a decedent's death.