GRESHAM
Sustainable Wealth Management

EVENTS

Attorneys and Other Advisors Working Together – Are Your Communications Protected?

American Law Institute-Continuing Legal Education: National Webinar

April 24, 2018

Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, moderated a national webinar on behalf of The American College of Trust and Estate Counsel, for ALI-CLE titled "Attorneys and Other Advisors Working Together: Are Your Communications Protected?"

Estate planning attorneys are often asked to include other advisors in conversations about estate planning and tax planning, and clients often assume that communications about their estate plans will remain confidential regardless of who is involved. But privilege does not apply to all communications and is easily waived, putting both client and attorney at risk. This webinar covered when privilege issues arise, the difference between privilege and work product, and considerations for maintaining privilege when other advisors (including accountants who have their own privileges) are participating in the planning process.

If you would like additional information, please contact Kim Kamin at kkamin@greshampartners.com, or 312-960-0200.