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# PRACTICAL ETHICAL ISSUES FOR ESTATE PLANNING LAWYERS

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**JEFFREY N. PENNELL, ESQ.** is the Richard H. Clark Professor of Law at Emory University School of Law in Atlanta. Professor Pennell is an excellent, nationally-recognized estate planning speaker and author of articles, institute chapters, casebooks, and portfolios. He is the successor author of *Casner on Estate Planning* and he is writing an Estate Planning coursebook (for West).

## TOPICS

- ✓ Clients Who Are Becoming Incompetent
- ✓ Undue Influence
- ✓ “Noisy” Withdrawals
- ✓ Identity Of The Client
  - entity
  - fiduciary
  - beneficiary
- ✓ Confidences In Representing Spouses
  - “priestly” approach
  - “tell-all” approach
- ✓ Solicitation
- ✓ Much More!



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- representing spouses
- dynastic family planning
- which rule applies?
- other common conflicts
- obligations imposed
- who is the client?



• **Independent Judgment**

• **Presentation Of Client Confidences**

- confidences in representing spouses
- other situations

• **Adequate Representation**

• **Fees**

• **Fiduciary Administration Concerns**

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## PRACTICAL ETHICAL ISSUES FOR ESTATE PLANNING LAWYERS

• May 5, 2005 • 1.75 Hours (105 Minutes) •

(213)

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