GRESHAM

Sustainable Wealth Management

EVENTS

American College of Trust and Estate Counsel Fall 2017 Meeting

"You're Keepin' Too Many Secrets From Me": Lawyers and Other Advisors Working Together – Are Your Communications Privileged?

October 20, 2017
Nashville, TN

Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, acted as moderator, joined with speakers Terrence Franklin (Sacks, Glazier, Franklin & Lodise), Jon Scuderi (Goldman, Felcoski & Stone) and Michael Simon (Gunster, Yoakley & Stewart) at the American College of Trust and Estate Counsel's Fall 2017 Meeting in Nashville, Tennessee.

Estate planners are often asked to include other advisors in conversations about estate and tax planning. This session covered when privilege issues arise, the difference between privilege and work product, and maintaining privilege when other advisors are participating in the planning process. Issues particular to email communication were covered, and best practices for preserving privilege were discussed.

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