

EVENTS

Estate Planning as a Team Sport: Attorneys, Accountants and Other Advisors Working Together – Are Your Communications Privileged?

**Illinois Institute for Continuing Legal Education
61st Annual Estate Planning Short Course**

May 15, 2018 – Champaign, IL

May 24, 2018 – Chicago, IL



Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, co-presented at the Illinois Institute for Continuing Legal Education, 61st Annual Estate Planning Short Course, on the topic of Estate Planning as a Team Sport: Attorneys, Accountants and Other Advisors Working Together – Are Your Communications Privileged?

Estate Planning Attorneys often assume all communications with clients are privileged, and clients often make the same assumption that communications about their estate plans will remain confidential regardless of who is involved. But privilege does not apply to all communications, and it is easily waived, putting both client and attorney at risk. This session examined privilege in the estate planning context, distinguished the work product doctrine, and particularly focused on communications involving accountants, wealth management advisors, and other members of the estate planning team.

The program took place at the iHotel, Champaign, IL and the Holiday Inn Chicago Mart Plaza, Chicago, IL.

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