

Estate Planning for Blended Families

Presented by John R. McNair

McNair Dallas Law

5430 LBJ Freeway | Suite 1200 | Dallas, TX 75240

469-210-8371 | www.McNair-DallasLaw.com

The University of Texas School of Law

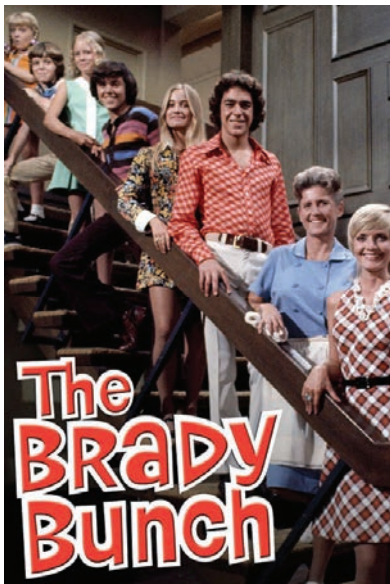
22nd Annual Estate Planning, Guardianship and Elder Law Conference

July 30 – 31, 2020 | Live Webcast

1

Introduction

Who's In My Waiting Area?



2

Primary Goals

1. Determine Your Client's Goals
2. Carry Out the Client's Goals
3. Avoid Conflicts



3

Who Do You Represent?

One Spouse

If so, consider discussing statutory spousal rights such as family allowance

Both Spouses



4

Ethics – Joint Representation

Conflicts

Confidentiality

Different sets of kids?

**Written Waiver of
Conflicts**

5

Get the Facts

Inventory

Prenuptial Agreement

Character of Property

Family Dynamics

Problematic Assets

Retirement Accounts

*"The facts, Ma'am.
Just the facts."*



6

Find the full text of this and thousands of other resources from leading experts in dozens of legal practice areas in the [UT Law CLE eLibrary \(utcle.org/elibrary\)](https://utcle.org/elibrary)

Title search: Estate Planning For Blended Families

Also available as part of the eCourse

[2020 Estate Planning, Guardianship, and Elder Law eConference](#)

First appeared as part of the conference materials for the
22nd Annual Estate Planning, Guardianship and Elder Law Conference session
"Estate Planning For Blended Families"