

Client Relations and Doing Business with Client: How Far is Too Far?

The Art of Collaboration, Fiduciary Duty, and Good Business Sense

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AN AFFINIPAY SOLUTION



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2 Claude E. Ducloux

- 42+-year seasoned attorney
- Board Certified in Civil Trial Law and Civil Appellate Law – Texas Board of Legal Specialization
- Former President, Austin Bar Assoc.
- Received Gene Cavin Award and Pat Nester Award for Lifetime Achievement in Teaching Continuing Education



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3 Who Are You? And What Are You?

1. You are highly trained.
2. You know how to do many tasks.
3. But why do people hire you?

Because you are a problem-solver.

Change your perspective- look at your work as “problem-solving.”

Your job is to get the most complete solution at the most reasonable costs -- consistent with justice.



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4 In your role as a lawyer, you are a Fiduciary

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- What is a fiduciary?
- Types of fiduciaries? Who can serve?
- Implications of such service on liability
- Duties imposed on lawyers
- Confidentiality of information
- Office practice

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Definitions and Elements

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6 What is a fiduciary?

A fiduciary can be:

- A person
- A trust
- A capacity between entities
- A duty
- A relationship
- A doctrine

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Title search: Client Relations and Doing Business with Clients:
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