

Estate Planning for Blended Families

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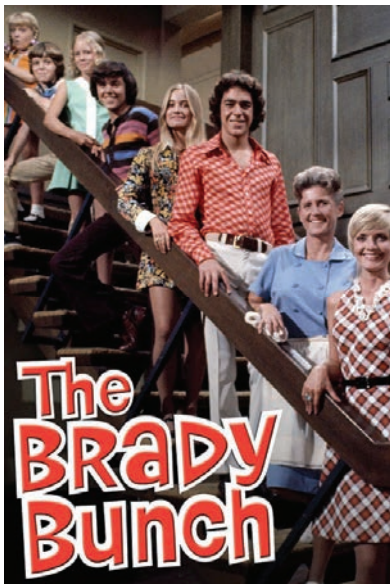
22nd Annual Estate Planning, Guardianship and Elder Law Conference

July 30 – 31, 2020 | Live Webcast

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Introduction

Who's In My Waiting Area?



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Primary Goals

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



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Who Do You Represent?

One Spouse

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

Both Spouses



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Ethics – Joint Representation

Conflicts

Different sets of kids?

Confidentiality

**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."*



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Title search: Estate Planning For Blended Families

Also available as part of the eCourse

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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"