FEBRUARY 2024



TEXAS Law The University of Texas at Austin School of Law

THE ETHICS OF SNT ADMINISTRATION

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UT LAW CLE

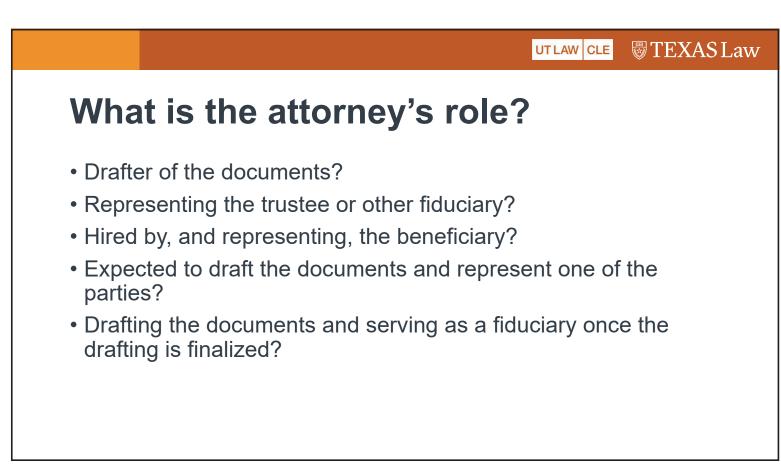
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"NO WORTHWHILE HUMAN ACTIVITY CAN BE COMPLETELY DEFINED BY LEGAL RULES"

TEXAS DISCIPLINARY RULES OF PROFESSIONAL CONDUCT, SCOPE

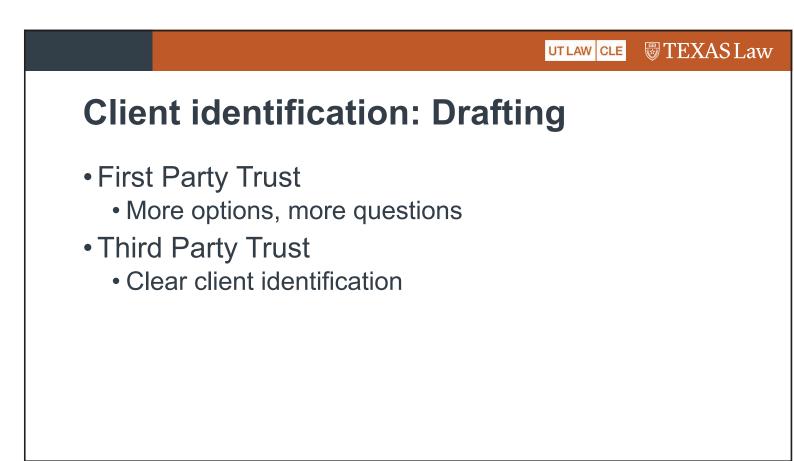
In this session we will:

- Discuss the attorney's role,
- Using hypotheticals, list various ethical issues for the attorney when reviewing the decisions a trustee makes in administering a trust,
- Offer suggestions regarding the trustee's decisionmaking process, and
- Discuss a framework for the attorney to make sure the trustee's decisions and actions are ethical.



Client identification

- How identify client?
- Why important?
- Ethics rules; substantive law, see Scope (12)
- To whom does the attorney owe a duty?
- Restatement (3rd) Law Governing Lawyers § 14 (how create client-attorney relationship



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Title search: The Ethics of SNT Administration

Also available as part of the eCourse Answer Bar: Considering a Special Needs Trust

First appeared as part of the conference materials for the 20^{th} Annual Changes and Trends Affecting Special Needs Trusts session "The Ethics of SNT Administration"