

Mum's the Word: Maintaining Client Confidentiality and Dealing with Ethical Challenges while Working from Anywhere and Everywhere

Presented by:

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Braxton Wilks is an associate in the Wealth Preservation Practice Group in Austin, Texas.

Braxton focuses his practice on trust and estate planning for business owners, corporate executives, and other high net worth individuals and families. In addition, he advises individuals on a wide range of legal matters, including premarital planning, wealth transfer planning, business succession planning, asset protection, charitable giving and the administration of trusts and estates.

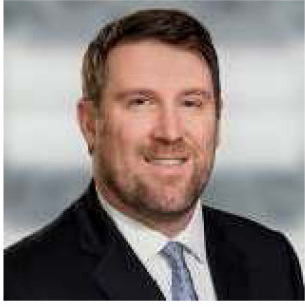
Braxton also has a background advising corporate clients on matters ranging from business formation and corporate governance to negotiating mergers, acquisitions and joint ventures between publicly traded corporations, privately held companies, and family-owned entities.

When Braxton is not in the office, he currently spends the majority of his free time his wife, Sheridan, preparing for the upcoming birth of their first child.

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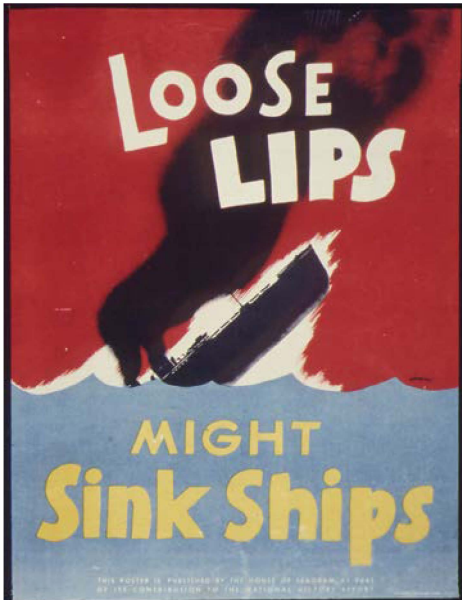
Jeff Chadwick is Chair of the Wealth Preservation Practice Group with offices in The Woodlands and Houston.

Jeff focuses his practice on trust and estate planning for business owners, corporate executives, professional athletes, and other high net worth individuals and families. He strives to provide innovative and practical solutions to a wide range of legal matters, including wealth transfer planning, trust and estate administration, business formation and succession, asset protection, charitable giving, and premarital planning.

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Jeff is a fellow of the American College of Trust and Estate Counsel, Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization, and recently served as Chair of the Estate & Gift Taxes Committee for the ABA Tax Section. He is a frequent speaker at estate planning seminars around the country and is an active member of many professional organizations.



Things “loose lips” might sink:

- Ships
- Client Relationships
- Attorney Reputations (and careers)

Today's Goals

1. Get ethics credit
2. Have a little fun
3. Take home a few practical tips
4. Get you out of here in time for Happy Hour

Outline of Presentation

- Review duty of confidentiality
- Maintaining confidentiality while working remotely
- Implication of virtual practice on other ethical duties
- Remote work: practical recommendations

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