

# Estate Planning for Blended Families

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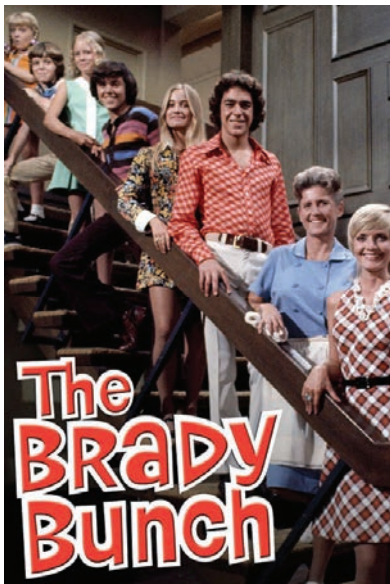
22<sup>nd</sup> Annual Estate Planning, Guardianship and Elder Law Conference

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

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."*



6

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Title search: Estate Planning For Blended Families

Also available as part of the eCourse

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