

# A Legal Ethics Holiday Season Wish List

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## Overriding Themes

- ▶ **Know (or be Sensitive to) the Rules.**
- ▶ **Be Intentional.**
- ▶ **Communicate Clearly and Effectively  
(And Eliminate Surprises).**
- ▶ **Stop. Think. Do. (And in that Order).**

## Road Map for Today's Presentation

- ▶ **The Importance of the Engagement Letter.**
- ▶ **Who is the Client?**
- ▶ **What is the Scope of the Work?**
- ▶ **How will You be Compensated?**

## Road Map for Today's Presentation

- ▶ **The Duty of Loyalty.**
- ▶ **Current Client Conflicts of Interest.**
- ▶ **Client Consent to Waive a Conflict.**
- ▶ **Conflicts Involving Former Clients.**
- ▶ **Advance Conflict Waivers.**

## Road Map for Today's Presentation

- ▶ **The Duty of Confidentiality.**
- ▶ **Permissive Disclosure of Client Information.**
- ▶ **Mandatory Disclosure of Client Information.**
- ▶ **Reasonable Steps to Maintain the Confidentiality of Client Information.**

## Road Map for Today's Presentation

- ▶ **The Duty to Communicate with the Client.**
- ▶ **Communicating with a Represented Person.**
- ▶ **Communicating with an Unrepresented Person.**

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[First Friday Ethics \(February 2023\)](#)

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