ONLINE SEMINAR

Onboarding Estate Planning Clients

Exploring the logistical issues and ethical considerations present in onboarding new estate planning clients

This new program provides a deep dive into the process of onboarding new estate planning clients, from ethical considerations such as conflicts, joint representation, initial communications, and continuing obligations following the execution of documents, to the logistical steps of engagement letters, fee estimates, information gathering, information storage, testamentary capacity evaluations, and other steps necessary to be completed prior to and immediately following the initial client meeting. Bring your questions and join the dialogue!

Agenda

- Initial Client Contact
- Conflict of Interest Check
- Engagement Letter
- Information Gathering
- Importance of Complete Information from the Client
- Joint Representation
- Fees and Billing
- Initial Meeting
- Testamentary Capacity Issues
- “Ask the Experts” Q&A Session

Faculty

Nikolaus S. Schuttauf, Esq., *Day Pitney LLP, Boston*
Christopher A. Voukides, Esq., *Day Pitney LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST
Wednesday, May 1, 2024
9:00 am–10:00 am
Program # 2240196WBC

REBROADCAST CC
Thursday, May 16, 2024
12:00 pm–1:00 pm
Program # 2240196RB1

REBROADCAST CC
Friday, May 24, 2024
9:30 am–10:30 am
Program # 2240196RB2

ON DEMAND WEBCAST CC
View after Friday, May 24, 2024
Program # 2240196WBA

Tuition *(includes written materials)*

- $145
- $130.50 MCLE Members
- $72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credit