Avoiding Litigation as a Fiduciary

June 30, 2021

Presented via live webinar.
This webinar is available at no cost.

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The role of a trustee, personal representative, or other fiduciary can be daunting for the unprepared. Trials and tribulations await even the most experienced professional fiduciaries. In order to succeed in these important roles and avoid unnecessary and often costly litigation, it is critical that fiduciaries become familiar with their duties and execute on a plan to fulfil those duties, communicating with interested parties and setting appropriate expectations along the way. Sometimes this also includes appreciating that "soft skills" can be just as important as the technical ones.

Join Lathrop GPM Partners Alison Zinn and Brian Dillon for an in-depth discussion on avoiding litigation in the fiduciary role. This free webinar will address a variety of topics and include several real-life examples and practical tips for fiduciaries at all levels of experience.

Agenda:
• It starts with communication
• Get to know the parties
• Accounting and recordkeeping
• Co-mingling
• Understand the governing document
• Understand the duties of a fiduciary
• Involve [the right] counsel early
• Preventive steps and remedies

- Understand the relationships to avoid conflicts of interest
- Watch out for capacity and / or undue influence issues
- The painful remedies

One hour of CLE credit will be applied for in Colorado, Kansas, Minnesota and Missouri.

For questions about CLE, contact Allison Bristow at: allison.bristow@lathropgpm.com
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