What Others Are Saying About
Undue Influence and Vulnerable Adults

“Compelling”, “page-turner,” “essential” are not words often used in reviews of legal texts. But the subject of this resource – protecting vulnerable clients – and the vast number of individuals who already or are likely to fall within the scope of abuse and/or undue influence – make owning this book a “must” for all financial services professionals. As the authors point out, “When the consequences of mistreatment go beyond financial loss and can trigger a downward spiral leading to loss of independence, serious complicating illness, and even death,” you clearly need to know more about your ethical, legal, and duties toward those of diminished mental, emotional, or physical capacity. Undue Influence and Vulnerable Adults is exceptionally well-written, comprehensive, well-cited, and highly practical.

Stephan R. Leimberg
Publisher of LISI (Leimberg Information Services, Inc.)

This is an excellent resource, not only for litigating estate issues, but also for estate planners who may need to defend their work product. This book warns of significant red flags, hazards and pitfalls that can upset estate plans when the planner is not cognizant of the ways an estate plan can be challenged. It is a thorough presentation of the critical issues that can be expected to arise in estate litigation and recites all the issues I saw during my 25 years as a probate judge handling challenges to estates. It is also a roadmap for practical ways estate plans can be challenged as well as defended. It would have been helpful to me if this book had been written while I was still hearing cases.

Honorable Milton L. Mack, Jr.

This book is an outstanding resource that every attorney involved in estate planning, as well as allied professionals that serve aging, infirm, chronically ill or others who could be subject to abuse or undue influence, must read. While brilliantly written to address issues that attorneys must understand, financial advisers, trust officers, even care managers will all benefit from the wisdom between these covers. This book is easy enough to read so it can serve as a resource for a new estate planning attorney to gain an understanding of the myriad of nuances and ancillary issues affected by undue influence. It is also sufficiently detailed and well researched so that it can serve as a reference for the practitioner. The authors bring the expertise and personal experience of both estate planners and litigators to provide practical insights to this vital topic covering ethical rules, attorney client privilege, no-contest clauses, and much more.

Martin M. Shenkman
Martin M. Shenkman, PC

As financial abuse reaches epic proportions, Undue Influence and Vulnerable Adults is required reading for every attorney: From practical advice about protecting vulnerable clients to valuable tips to safeguard your practice, this book is a must-read from top practitioners whose prowess I have had the privilege of witnessing first-hand.

Sharon L. Klein
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