



Attorneys build trust through communication, knowledge

By DOUG SHERWIN, The Daily Transcript
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For attorneys handling financial matters, communication and knowledge are key to gaining a client's trust.

Estate planning attorneys, especially, need to be viewed as a trusted adviser since they deal with personal money matters involving families.

"You gain trust by educating the client on the current gift estate tax laws," said Parisa Weiss, an associate with the San Diego law firm Seltzer Caplan McMahon Vitek. "You let them know you are up on the current laws that affect their estate."

Information is power. Weiss said she really wants to know what a client's goals are.

"My role as an estate planning attorney is to advise and educate clients on the different options they have based on their estate and based on what kind of legacy they want to leave, what kind of charity requests they want to leave," she said.

Michael Abramson, a partner with San Diego's **Solomon Ward Seidenwurm & Smith**, also said it's important to know as much as you can about how the client's business works.

Abramson focuses his practice on corporate and business law, business disputes and real estate as well as estate planning.

"Becoming a client's trusted advisor requires first establishing yourself as technically proficient, reliable and deeply committed to doing everything you can to help your clients achieve their goals and reach their potential," he said. "Then, you have to provide good and thoughtful advice."

Abramson said he has invested a lot of time in business education throughout his career.

"While I'll never know my clients' businesses as well as they do, I want to understand their products, strategies and market," he said, "as well as industry

trends and general business basics. Ultimately, I believe that will make me a better adviser."

Seltzer Caplan's Weiss said it's very helpful to be in constant contact with her clients as well as the other advisers her clients are using, including accountants, tax preparers, financial advisers and insurance providers.

"You want to communicate frequently (with the client) and include them in the drafting of the documents and why they are designed the way they are," she said.

"We also communicate regularly with other trusted advisers, making the client feel like all their advisers are working together. It's a team effort in making sure the clients wishes are understood, like charitable requests or making sure the business will still be going."

Weiss said it's important for a client's team of advisers to understand and be in agreement over what needs to be done to fulfill the client's wishes.

"The more you meet and communicate with other advisers, it builds that trust, which is paramount," she said.

Trust and estate planners can be aware of extremely sensitive family dynamics, like if a parent wants to disinherit a child and what beneficiaries think of the client. It makes earning a client's trust all the more important.

That kind of trust is gained through being honest.

"Certainly if a client wants to allow another family member to be present at a meeting, that's okay," Weiss said.

Solomon Ward's Abramson said not all attorney-client relationships reach that level of trust. For some attorneys, who are requested just to handle a specific transaction or negotiate a certain contract, their role is just as that of a vendor.

But attorneys also can find some of their cases take on a more personal tone.

"The pinnacle of a meaningful relationship is when a lawyer becomes a client's trusted adviser," Abramson said. "As a client's trusted adviser, our job becomes much more interesting and fulfilling. We are included in a matter much earlier and become privy to much more information than we would be if we were simply vendors and, as a result, we are able to do an even better job for our clients."

Abramson said being a client's trusted adviser is a real privilege, but it's not guaranteed to last if that trust isn't constantly affirmed.

"It is appropriate to be grateful for that opportunity (as a trusted advisor)," he said. "One way to express that gratitude is by never taking the relationship for granted and constantly re-earning the client's trust."

The quickest way for an attorney to become a trusted adviser is if he or she is recommended by a previous client.

"It's important to choose an attorney through referrals and not through opening up the Yellow Pages," Weiss said. "If it comes from another trusted adviser – an existing client – then the client trust is already there."

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