

Protecting Your Confidentiality

As the client, you are entitled to expect that all information provided to this office will be kept confidential and that this office will always protect any information received from you. The attorney–client relationship enjoys the greatest privilege under New Hampshire law and is further protected by stringent professional standards of confidentiality. Particularly in the field of estate planning, substantial personal and private information should be obtained in order to be able to best represent you and plan for you and your family’s individual needs. This information is confidential and will be protected.

Releasing Information—Only as Needed and Only with your Permission

To properly assist you, it may become necessary to exchange certain of your personal information with others, such as your accountant, financial counselor, insurance agent or other advisors. This is done only after reviewing the need with you and obtaining your prior consent. You will receive copies of any correspondence that we may generate during our representation. You may also request that a family member or other person receive copies of letters and documents. You must realize, however, when we do release personal information to others, at your request, that information may not remain protected, as it is by this office.

Representing Mutual Clients

It is fairly common in estate planning to represent multiple family members in mutual planning efforts, such as a husband and wife. When doing this, however, you must realize that any information shared by one client is not confidential as to the other mutual client. As an example, when an attorney represents both spouses in estate planning, one spouse has no right to expect that what they say to us, even in private, will not be shared with the other spouse—because we are representing both clients in pursuing a common goal. Although rare, a situation could arise where one client desires to maintain confidentiality apart from the other. In this situation, we would be compelled to require that client to retain a separate attorney and, based on the circumstances, may possibly be precluded from representing either of you.

Maintaining and Preserving Confidential Information

Non-public personal information about our clients will not be disclosed to anyone outside this law firm, unless agreed to by you or as permitted by law. We retain records relating to professional services that we provide so we are better able to assist with your professional needs and to comply with the law and our professional standards. To protect your personal information we maintain physical, electronic and procedural safeguards that comply with our professional standards. Even after your matter is concluded and your file closed, your information remains confidential and will be protected. Please let us know if you have any questions.