



## Ethics FAQs

- Q:** Is my agreement with Guidr considered fee sharing?
- A:** No. Your firm is paying for a subscription with Guidr, which is merely a platform fee. Additionally, Guidr further collects "client fees" for each document generated on the Guidr platform. Guidr's client fees are a static amount and are not a percentage of the fees charged by your law firm. The fee collected by Guidr remains the same no matter what your firm charges.
- Q:** Do I need to change my coverage or contact my malpractice insurance agent?
- A:** No. You are still providing estate planning legal services just as you were before.
- Q:** When is an end user my client?
- A:** While attorney-client privilege and confidentiality is preserved from the beginning, the client relationship begins as soon as the client reviews and accepts the engagement agreement.
- Q:** Is recommending a plan considered "legal advice"?
- A:** No. Merely recommending one or multiple plans to meet the clients' goals, based on the limited information they provide, is not considered "legal advice."
- Q:** What if the client does not execute the documents properly?
- A:** It is clear to the client that it is their responsibility to follow the signing instructions provided. There are multiple warnings explaining the importance of executing the documents properly. The client is able to see the signing instructions before choosing the self-sign option. While you can give them advice, you cannot make them take that advice.
- Q:** Can I have a paralegal or other team member review the workflows?
- A:** A duly-licensed lawyer needs to review or otherwise take professional responsibility for all documents generated by the Guidr platform prior to execution by the client.



## Ethics Statement

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"Why lawyers are so negative about adopting practice-related technology is baffling. Technology has made them more productive (they can work whenever, wherever). It has reduced labor costs (who needs a secretary anymore?), office-related costs (who needs a library or file room?), and has enhanced instantaneous client and colleague communication. Despite such benefits, lawyers continue to look for reasons to keep doing everything the same way."

"Whatever reasons may exist for preserving the past and avoiding the future, ethical rules just aren't among them. New technologies don't present new ethics issues. Rather, they present old issues lawyers continue to resolve with old solutions."

"So, don't reflexively assume using a new thingamajiggy will present an ethical problem. Assume instead that using it carelessly will. In *The Digitization of Law*, Dave Zumpano and Guy Remond get this. While remaining mindful that these new technologies do present ethical risks, they zealously promote the use of cutting-edge law-practice technologies and go the extra mile to incorporate safeguards when possible to support attorneys in maintaining ethical standards."

