

Privileged Notes — Client Meeting and Sensitive Family Dynamics

Matter: Estate of Henderson — Estate Planning and Trust Package | Sensitivity: PRIVILEGED | Allowed roles: pa

Attorney Notes — Do Not Distribute

Client expressed concern that one child may contest; prefers to appoint neutral corporate trustee if conflict escalates. Client also requested that certain gifts be handled discreetly to avoid family disputes.

Planning Considerations (Synthetic)

Recommend enhanced no-contest clause and clear documentation of intent. Consider separate letter of wishes to guide trustee discretion while keeping details out of public-facing documents.