



What's a Trustee to Do?

Challenges and needs facing fund trustees

Katherine D. Hartman, Esquire

Grace R. Schuyler, Esquire

Kathryn Peifer Morgan, Esquire

Moderator

You want me to serve on what?

Client Protection Fund





Orientation

- Introduction to other Board members.
- What would have been helpful that was not provided?
- What were your concerns prior to your first meeting?

Lawyers and Non-Lawyer Members



Lawyers

- Rule of law oriented?
- Look for ways not to pay?
- Other

Non-Lawyers

- Understand function of Fund?
- Able to convey public's perception?
- Tendency to defer judgement to lawyer members?
- Other

Difficult Claims

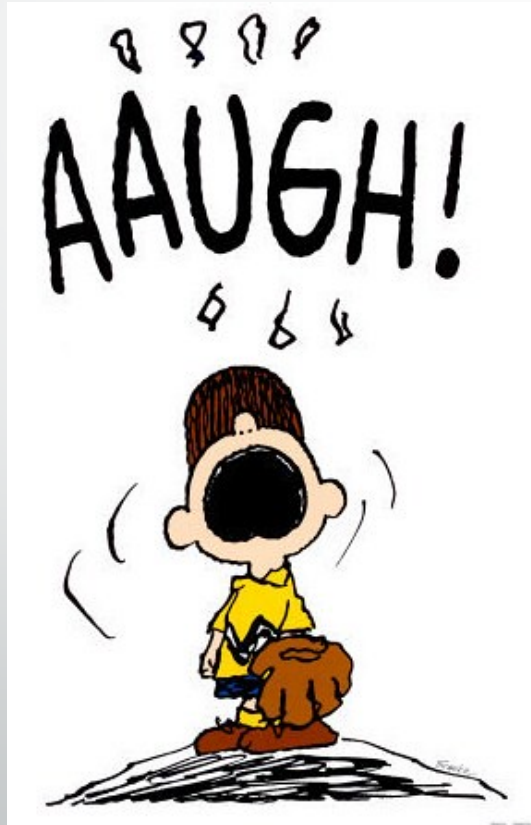
- Open discussion?
- Staff's recommendation influence Board?
- Is dying dishonest?
- Malpractice v theft – easy to identify?
- Unearned fees
- Claimant with “character” issues



Discretion – a powerful tool

- Comfortable using?
- Book of Precedents – hinder use of discretion or helpful?

What was your biggest disappointment during your term?



What was your best “feel good” moment serving as a Trustee?

