

Wills, Trusts & Estates**Will we meet again? The Zoom boom**By **Margaret O'Sullivan**

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(June 18, 2021, 9:14 AM EDT) -- For more than a year now, our client meetings have not been in person, but instead virtual through videoconferences. At first, we were enamoured at the novelty of this new way of interfacing with our clients. As time has marched on, we have gained new perspectives on some of the advantages and disadvantages of using Zoom and other video platforms.

As the workplace redefines itself going forward, and the likelihood that many professional advisers will work at least part of the regular work week from home permanently, Zoom and other video platforms are here to stay.

The challenge will be once video calls are an option, as opposed to a necessity because of the pandemic, how best to utilize them? What are some of their benefits and shortfalls? These are issues that professional advisers and others will need to grapple with.

Zoom has allowed us to connect with our clients all over the world with an ease and convenience we never had before. For our clients who are not geographically close by, or not able to as easily meet physically with us for a variety of personal reasons, such as health and mobility issues or family obligations, we can now effectively communicate without the need for an in-person meeting. Video calls will allow for far more flexibility in future in how we arrange our interactions to best suit our client's needs than we ever had in the past.

As an example, our snowbird clients often are very time-pressed in October and November to get their affairs in order before they head south for several months. There will likely be less pressure going forward as we can now communicate virtually, and as a result of recent permanent changes to legislation in Ontario for the execution of wills and powers of attorney, we can also sign and witness these documents virtually in a videoconference. Videocalls have introduced a significant fluidity into the process.

But can Zoom calls and other video platforms replace in-person meetings? What impact will they have on our long-term relationships with our clients?

It's true that we can "get the job done" from beginning to end and never meet a client throughout the entire process of providing estate planning and other professional advice, but what is the level of quality of the communication and the client experience?

In estate planning in particular, personal touch is key. When we close the boardroom door and meet in person, our clients know we are bound by solicitor-client privilege and the duty of confidentiality and that they have a unique opportunity to share with us in a most intimate way their wishes and desires, concerns and fears, and hopes for the future and for their family. How we interact with our clients, our emotional intelligence and our ability to empathize and put ourselves in our clients' shoes allows us to understand their goals and objectives so we can come up with the best solutions. Anything that diminishes the quality of our communication can diminish the value we offer our clients as professional advisers.

In-person meetings simply offer a better level of communication. They say that 93 per cent of communication is voice tone, non-verbals and body language. Virtual meetings do not allow for the

full range of body language. Eye contact is critical to communication and connecting with another human being, yet in a virtual meeting, there is no direct eye contact. Body language and physical cues are restricted, as is the ability to read facial expressions. General appearance is usually limited only to the upper body. There is as a result a "flatness" to a virtual meeting that can't compare to the energy and chemistry of an in-person meeting.

On the other hand, there is a sense of relaxation that a Zoom call often generates, helped out by clients feeling more comfortable in their home setting, often seated together on a favourite sofa, and with domestic touches as opposed to a formal office, which make some clients uncomfortable. Over the last few months, as well as meeting my clients virtually, I have had the privilege of meeting most of my client's dogs virtually as well, as they often sit in on meetings.

Going forward, the challenge will be in choosing wisely and using virtual meetings appropriately. They offer an additional way of interacting that we did not have before, and over time we will learn how best to use them. I envision most professional advisers will wish to use a combination of in-person and virtual meetings based on what works best given their client's needs and desires. The end result should be a "win-win" as we are able to offer our clients more flexible options in how we communicate and accommodate them, wherever they may be.

Exciting times lie ahead. The pandemic has forced us to take a large digital leap forward in a compressed time period. There will be no going back as we learn to adapt and then embrace the fundamental changes that will occur to our client interactions and everyday practice that technological change has brought about.

P.S. — the headline of this article is a nod to the incomparable British singer Vera Lynn, whose song *We'll Meet Again* served as the anthem for many star-crossed lovers who met through serendipity all during the Second World War in England and across Europe. Thanks to YouTube, you can go down memory lane and hear her famous rendition right now.

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