

Rule 2.3. Evaluation for Use by Third Persons.

1 (a) A licensed paralegal practitioner may provide an evaluation of a matter affecting a client
2 for the use of someone other than the client if the licensed paralegal practitioner reasonably
3 believes that making the evaluation is compatible with other aspects of the licensed paralegal
4 practitioner’s relationship with the client.

5 (b) When the licensed paralegal practitioner knows or reasonably should know that the
6 evaluation is likely to affect the client’s interests materially and adversely, the licensed paralegal
7 practitioner shall not provide the evaluation unless the client gives informed consent.

8 (c) Except as disclosure is authorized in connection with a report of an evaluation, information
9 relating to the evaluation is otherwise subject to Rule 1.6.

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11 Comment

12 Definition

13 [1] An evaluation may be performed at the client's direction or when impliedly authorized in
14 order to carry out the representation. See Rule 1.2. Such an evaluation may be for the primary
15 purpose of establishing information which may be used by third parties; for example, a calculation
16 of child support obligations of another party.

17 [2]-[6] Reserved.

Effective November 1, 2018