Willeroy v. Calvert and Lexington Investment Company LLC

Summary judgment on claims for breach of fiduciary duty, churning, unsuitability and negligence against broker for estate, holding that broker could rely on instructions from the attorney/executor for the estate and that as an attorney, the attorney was charged with knowledge/duty to ask for sufficient information, even if not provided, to make knowledgeable informed investment decisions.

Oct 12, 2010

Categories:

Experience

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