Textbook  None! There will be assigned readings for each class that will be either posted or linked on the CANVAS website under the Modules tab.

This class will be a drafting-oriented class. There will be no comprehensive final exam. Instead, there will be weekly drafting assignments. In addition, each student is required to read a book on an estate planning topic (either from a list of suggested books or a book approved by me), turn in a written review of the book and give a brief presentation to the class summarizing the book. Each drafting assignment will be assigned 10 to 20 points (depending on the length and complexity) and the book review and presentation will be assigned 20 points. Grades will be determined on the total number of points, based on the following schedule:

- 86-100% of available points – A
- 71-85% of available points – A-
- 60-69% of available points – B+
- 50-59% of available points - B

Assignments. Under the Modules tab on the CANVAS website, there are posted assignments for each week. What is posted may change as the quarter goes on. You do not have to read all of the posted material in the same way that you read assignments from a casebook. My intention is show you the array of resources available to you, as well as give you a basic background. Some materials will be posted as optional, others as “skim.” IF NOT MARKED AS SKIM OR OPTIONAL, THE MATERIALS ARE REQUIRED READING. IF THERE IS A READING ASSIGNMENT POSTED FOR A PARTICULAR DAY, THE INSTRUCTIONS ON WHAT IS REQUIRED AND WHAT IS SKIM OR OPTIONAL WILL BE EXPLAINED THERE. At least one posting for each class will be necessary reading.

Week 1.  Day 1 - Developing the Client Relationship; organizing the estate planning practice; Fundamentals of Will Drafting

Day 2 : Estate and gift taxation overview

Week 2. Day 1 – Will drafting for Married Couples

4-7-15 :
Day 2 – Nontraditional Families

**Week 3.** Day 1 – Miscellaneous Nontax provisions in Wills (Tangible personal property, appointing trustees, pet trusts, powers of appointment etc.); Client Correspondence

Day 2 – Lifetime Gifting

**Week 4.** Day 1 – Remarriage
4-21-15

Day 2 – Planning for Incapacity

**Week 5.** Day 1 – Elderly Clients; Dealing with Elder Abuse
4-28-15

Day 2- Clients with Young Children; Special Needs Trusts

**Week 6.** Planning with Retirement Assets
5-5-15

**Week 7.** Charitable Gifts
5-12-15

**Week 8.** Day 1: Revocable Living Trusts
5-19-15

Day 2: Planning with Trusts