

DATE	TOPIC/SPEAKER	ASSIGNMENT	READING
1. Tuesday, August 24	<p><i>Class Introductions</i></p> <p><i>Client Communication/Conducting Client Interview</i></p> <p><i>Overview of basic estate planning concepts and documents</i></p>	<b>Written Assignment #1 assigned</b>	<p><b>Read: Oregon State Bar Article:</b> "The New Client Interview"</p> <p><b>Study:</b> Confidential Family Information Sheet, Attorney Estate Planning Quicklist and Documents to Bring to Estate Planning Consultation</p>
2. Tuesday, August 31	<p><i>The State of Drafting</i></p> <p><i>In class client interviews (advanced clinic students and/or Betsy Trimble)</i></p>	<b>Written Assignment #1 Due</b> <b>Written Assignment #2 Assigned</b>	<p><b>Read: Millard,</b> Chapter 1</p> <p><b>Beyer:</b> Common Non-Tax Estate Planning Errors</p> <p><b>Study and compare will in §6.1 and §6.2 of Millard with Professor Cook's Master Will (which is based upon Professor Vollmar's Master Will #6 from the OSB Basic Estate Planning CLE 2006).</b></p>
3. Tuesday, September 7	<p><i>Matters of Style</i></p> <p><i>Drafting to your Audience</i></p> <p><i>Betsy Trimble Client Interview</i></p>	<b>Written Assignment #2 Due</b>	<p><b>Read: Millard,</b> Chapter 2</p> <p><b>Read: McAlpin</b> article on the passive voice.</p>
4. Tuesday, September 14	<p>Matters of Style cont....</p> <p>Drafting to your audience</p> <p>Guest Speaker: TBA</p>	<b>Written Assignment #3(a) assigned</b>	<b>Read: Millard,</b> Chapter 3
5. Tuesday, September 21	<i>How to avoid a Will Contest</i>		<p><b>Read: Hopkins,</b> "Your Will and Trust Aren't Enough: Using Beneficiary Designations as an Estate Plan" (2015).</p> <p><b>Read: Lund,</b> "Coordinating Beneficiary Designations with the Estate Plan" (2009).</p>

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			<b>Read: Garvey, “Drafting Wills and Trusts, Anticipating the Birth and Death of Possible Beneficiaries” (1992).</b>
6. Tuesday, September 28	<i>Beneficiary Designations</i>  <i>Organization of Estate Planning Documents</i>	<b>Written Assignment 3(a) Due</b>	<b>Read: Millard Chapter 4</b>
7. Tuesday, October 5	<i>Physical Appearance of Documents</i>  <i>Durable Powers of Attorney</i>  <i>Discussion of Written Assignment 3(a)</i>	<b>Written Assignment 3(a) returned and Written Assignment 4(a) Assigned</b>	<b>Read: Chapter 1 “Planning for Quality of Life” of the 2017 revised Oregon State Bar “Elder Law” manual.*</b>
8. Tuesday, October 12	<i>Revocable Living Trusts</i>  Guest Speaker: TBA		<b>Read: “The Role of Trusts in Estate Planning Process” of the Oregon State Bar “Administering Oregon Trusts” manual by Robert J. Saalfeld and Jeffrey G. Moore.*</b>
9. Tuesday, October 19	<i>Forms</i>  <i>In Class client interviews</i> <i>Betsy Trimble interview cont..</i>	Written Assignment 4(a) Due and Written Assignment 5(a) Assigned	Read: Millard Chapter 5
10. Tuesday, October 26	<i>Oregon Advance Directives</i>  <b>Guest Speakers: TBA</b>	Written Assignment 4(a) returned and Written Assignment 5(a) Due	TBD
11. Tuesday, November 2	<i>Client Letters</i>  <i>Revocable Living Trusts</i>  <i>In Class client interviews</i> <i>Betsy Trimble interview cont..</i>	Written Assignment 5(a) returned and Written Assignment 6 Assigned	<b>Read: Martin, How to Write Letters Nonlawyers Will Read.</b>
12. Tuesday, November 9	<i>Proofreading</i>  <i>Revocable Living Trusts</i>		<b>Read: Rowe article on proofreading</b>

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13.Tuesday, November 16  <b>LAST DAY            OF CLASS</b>	<i>Last Day of Class            Celebration</i>	<i>Written Assignments 3b, 4b,            5b and 6 Due</i>	n/a