WILL AND TRUST DRAFTING
PROFESSOR SUSAN P. COOK
Fall 2021

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COURSE INFORMATION

Course Objectives

This course builds the skills needed to draft estate planning documents for clients who require primarily non-tax estate planning. After discussing the basic format of a "New Client Interview" and a review of the substantive law of trusts and estates, we will turn to drafting estate planning documents such as wills, durable powers of attorney, "Advance Directives" and trusts.

This course is a two-credit, graded course that satisfies the practical skills writing requirement. Students meet once a week for two hours. Enrollment is limited to no more than 20 students. Trust and Estates is a prerequisite unless specifically waived.

Required Text

The required text is Kevin D. Millard, *Drafting Wills, Trusts, and Other Estate Planning Documents: A Style Manual* (Bradford Publishing 2006), which may be purchased at the bookstore.

Class Lectures

PowerPoint computer slides may be used during class. These slides will be e-mailed to you prior to class or made available in advance on the Wise site.

Class Assignments

Seven class assignments will be provided to you throughout the semester. Completed assignments must be submitted through Wise before the specified deadline.

Reading Materials and Handouts
Any assigned reading materials will e-mailed to you (or made available on the Wise site) a week before each class in addition to any handouts.

Class Questions

I welcome your questions at any time. I am available anytime I am not in class to meet you in my office at the clinic. Feel free to contact me by email or cell phone.