OVERVIEW: ESTATE PLANNING PRACTICE LAB is a one-credit course which meets on alternate Wednesdays from 12:45 p.m. until 2:00 p.m. The first class is on Wednesday January 15th. A complete class schedule is attached to this syllabus.

CONTENT: This course will be a basic introduction to estate planning practice and techniques, emphasizing the development of skills necessary to the practice of trust and estate law including the law of wills, testamentary and inter-vivos trusts, tax considerations, powers of attorney, advance directives for health care and ethical and malpractice issues. In the context of a law firm’s actual practice, and through a series of exercises both in and out of class, you will have the opportunity to simulate actual law practice, including client interviews and preparation of basic estate planning documents.

COMPETENCIES/LEARNING OUTCOMES: In the context of a law firm’s actual practice, and through a series of simulations and exercises both in and out of class, at the end of this course, you should be able to:

1. Apply the basic law of trusts and estates to simulated fact scenarios.
2. Analyze estate planning issues including probate avoidance, basic tax considerations, and planning for incapacity.
3. Conduct a client in-take interview relating to an estate planning matter.
4. Prepare basic estate planning documents.
5. Recognize potential ethical and professional malpractice issues

TWEN SITE: There us a TWEN site established for this course for which you must register. I will be posting materials and assignments on TWEN and using it as a means of group communication.

The concept of this course is that you are an associate in a general practice law firm in Vermont. You have been assigned to work with me, a partner in the firm with an estates and trusts practice.

GRADES: There is no final exam. Grades will be based on your performance in the class apportioned as follows:

Class Participation (including "in-class" exercises) 40%
Out of Class Assignments (non-document drafting) 30%
Document Drafting 30%

There will be opportunities given during the course for you to do extra credit assignments.
TEXTS AND OTHER MATERIALS: There is NO text or coursepack for this course. There will be a number of supplemental handouts during the course.

ATTENDANCE: Because we work in teams to a certain extent, it is important that everyone be present in class. You are expected to attend all classes except in the case of illness.

CONTACT INFORMATION: The best way to reach me outside of class is to e-mail me at gbrooks@vermontlaw.edu. Many days I am in my office at VLS (118 Waterman). On other days, if your question or matter is time sensitive, you can call or text me at (603) 443-1221.
# COURSE SCHEDULE (LAST REVISED 11/15/19)
## GPP - ESTATE PLANNING PRACTICE LAB
### SPRING 2020

<table>
<thead>
<tr>
<th>CLASS</th>
<th>DATE</th>
<th>DESCRIPTION</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>01/15/20</td>
<td><strong>INTRODUCTION AND CLASS ORIENTATION</strong>&lt;br&gt;The role of the Estate Planning attorney&lt;br&gt;Client interviews and in-take memoranda</td>
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<td>2</td>
<td>01/29/20</td>
<td><strong>INTRODUCTION TO WILLS</strong>&lt;br&gt;Drafting of a specific will provision&lt;br&gt;Drafting of a simple will&lt;br&gt;Conducting a will execution</td>
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<td>3</td>
<td>02/12/20</td>
<td><strong>NON-PROBATE TRANSFERS AND WILL SUBSTITUTES</strong>&lt;br&gt;Planning for probate avoidance&lt;br&gt;Retitling of assets using will substitutes</td>
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<td>4</td>
<td>02/26/20</td>
<td><strong>REVOCABLE TRUSTS</strong>&lt;br&gt;Drafting of Revocable Trust&lt;br&gt;Funding of Revocable Trust</td>
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<td>5</td>
<td>03/25/20</td>
<td><strong>THE PROBATE PROCESS</strong>&lt;br&gt;Opening Probate&lt;br&gt;Forms and Procedures&lt;br&gt;Closing Probate</td>
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<td>6</td>
<td>04/08/20</td>
<td><strong>PLANNING FOR INCAPACITY</strong>&lt;br&gt;Drafting of Durable Powers of Attorney&lt;br&gt;Drafting of Advance Directives for Health Care</td>
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<td>7</td>
<td>04/22/20</td>
<td><strong>ETHICAL ISSUES FOR ESTATE PLANNERS</strong>&lt;br&gt;Fiduciary duties&lt;br&gt;Conflicts of interest&lt;br&gt;Drafting of disclosure and waiver documents</td>
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***************** SPRING BREAK *****************