DRAFTING WILLS AND TRUSTS
SUMMER TERM 2011
SYLLABUS

Professor Craig P. Goldman
Phone: (952) 886-7205
E-mail: craig@craiggoldmanlaw.com

Note: E-mail is strongly preferred over the telephone as a means of contacting Professor Goldman

Required Texts: ☞ None. We will work exclusively from handouts provided by Professor Goldman over the course of the class.

Goals and Objectives: This course is intended to introduce students to the art of drafting the various estate planning documents available today. Discussion points will include the specific components of several types of documents, variations on the available standard forms, and numerous examples of poor lawyering in this area. Some attention will also be given to drafting related documents such as powers of attorney and health care directives.

Attendance Policy: Attendance will be taken at the beginning of each class. Because there are only two class sessions, absence from any portion of any session will be deemed grossly excessive, and will result in the removal of the student from the class. The decision whether such student will receive a "W" or an "F" grade for the class rests solely with the Associate Dean and not with Professor Goldman.

Testing and Grading: Each students' grade in the class will be based entirely upon the score earned by that student on the Final Exam, given at the end of the second day of class. Class participation is strongly encouraged as a means of solidifying a student's grasp of the course principles, but will not have an impact of the student's final grade.

Class Assignments:

1. Saturday, July 9, 2011 (morning) (9:00 – 12:00)

Disability Planning Documents

- Powers of Attorney
  - Statutory Short Form
  - Common Law
  - I.R.S.

- Health Care Directives
  - versus Living Wills, Health Care Powers of Attorney, etc.

2. Saturday, July 9, 2011 (afternoon) (1:30 – 4:30)	<u>Drafting Wills and Trusts</u> - Wills vs. Trusts - Tax Planning Issues - Children Issues
3. Sunday, July 10, 2011 (morning) (9:00 – 12:00)	<u>Drafting Wills and Trusts</u> - Continuation of previous class period - Supplemental and Special Needs Trusts - Irrevocable Life Insurance Trusts
4. Sunday, July 10, 2011 (afternoon) (1:30 – 4:30)	<u>Review and Exam</u>