Estate Planning (“EP”) 101

Quips, tips, tricks and other personal opinions of

Bernard E. (“Barney”) Jones

I. Introduction; Scope of Presentation

A. This Presentation is *not*

- Supported by any cases or statutes
- Backed up by a written outline
- A useful resource for Will and trust drafting
- A researched analysis of EP law
- Scholarly in any other way

B. This Presentation *is*

- A practice oriented nuts & bolts overview / how-to / to-do for
  Basic Estate Planning
- From the initial contact, planning conference & terms of engagement, to the signing ceremony, exit letter & beyond
- With options and insights for what is and is not appropriate depending on the circumstances
- Part what I really think
- Part “devil’s advocacy” and other alternative views

C. “*Basic* EP” *is not*

- Transfer tax planning
- Business continuity planning
- Medicaid and other benefits planning
- Pre-marital, pre-divorce
- Pre-bankruptcy, creditor planning

D. “*Basic* EP” *is*

- Deciding
  - Who gets the clients’ property at (or prior to) death and how they get it
  - How to minimize probate cost and complications
  - Who’s in charge—
    - Executors and Trustees
    - Guardians for minor & incapacitated children
    - Agents etc. for the clients if they’re incapacitated
- Implementing those decisions

Title search: Estate Planning 101

Also available as part of the eCourse
2019 Estate Planning, Guardianship, and Elder Law eConference

First appeared as part of the conference materials for the
21st Annual Estate Planning, Guardianship and Elder Law Conference session
"Estate Planning 101"