

Preface

Ensure student success with the Focus Casebook Series.

THE FOCUS APPROACH

In a law office, when a new associate attorney is being asked to assist a supervising attorney with a legal matter in which the associate has no prior experience, it is common for the supervising attorney to provide the associate with a recently closed case file involving the same legal issues so that the associate can see and learn from the closed file to assist more effectively with the new matter. This experiential approach is at the heart of the *Focus Casebook Series*.

Additional hands-on features, such as Real Life Applications and Applying the Concepts, provide more opportunities for critical analysis and application of concepts covered in the chapters. Professors can assign problem-solving questions as well as exercises on drafting documents and preparing appropriate filings.

CONTENT SNAPSHOT

This casebook focuses on clear communication of the fundamentals of wills, trusts, and estates. On completion of the course, students will have not only the comprehensive substantive knowledge base needed for advanced study in this field of law, but also a healthy degree of familiarity with various WTE-related resources. The student will emerge with the ability to perform well in a clinical or practice setting.

- Chapter 1 explores core trusts and estates issues of intent, testamentary freedom, and introduces trusts and estates practice.
- Chapter 2 examines intestacy laws that dictate the transmission of property when there is no will.
- Chapters 3 through 6 turn to wills, focusing on their execution, interpretation, and revocation, as well as will contests.
- Chapter 7 examines will substitutes (e.g., beneficiary designations and pay-on-death provisions) and the process of planning with will substitutes. It also considers the fast-changing law associated with planning for incapacity, such as health care, financial, and digital asset planning.
- Chapter 8 examines protection for the family, including the spousal right of election and the treatment of a spouse or children omitted from a will.

- Chapters 9 through 12 look at the law of trusts and the responsibilities of the fiduciaries charged with administering trusts, and include a brief description of charitable trusts. These chapters provide instruction on drafting, amending, or terminating a trust as well as building in flexibility.
- Chapter 13 explores professional responsibility issues in trusts and estates practice.
- Chapter 14 surveys the process of administering a decedent's estate with or without a valid will.
- Chapter 15 introduces estate tax law and its ramifications for sound estate planning.

RESOURCES

Casebook: The casebook is structured around text, cases, and application exercises. Highlighted cases are introduced with a *Case Preview*, which sets up the issue and identifies key questions. *Post-Case Follow-ups* expand on the holding in the case. *Real Life Applications* present opportunities to challenge students to apply concepts covered in the case to realistic hypothetical cases. *The Applying the Concepts* feature demands critical analysis and integration of concepts covered in the chapter.

Other resources to enrich your class include: Study Aid titles such as *Examples & Explanations: Wills, Trusts and Estates*, by Gerry W. Beyer. Ask your Wolters Kluwer sales representative or visit the Wolters Kluwer site at wklegaledu.com to learn more about building the product package that's right for you.