

# Estate Planning (“EP”) 101

*Quips, tips, tricks and other  
personal opinions of*

Bernard E. (“Barney”) Jones

1

## I. Introduction; Scope of Presentation

2

## 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

Find the full text of this and thousands of other resources from leading experts in dozens of legal practice areas in the [UT Law CLE eLibrary \(utcle.org/elibrary\)](http://utcle.org/elibrary)

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  
21<sup>st</sup> Annual Estate Planning, Guardianship and Elder Law Conference session  
"Estate Planning 101"