



UNIVERSITY OF
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ESTATE PLANNING First Assignment

CLASS 1

Topic: The Process and Client Representation

Assignments:

Read CB Chapters 1 and 2

Print IRS Form 706 and corresponding instructions

Search internet for sample client intake forms (for t&e practice) and engagement letters.

Glance over the sample intake form and sample engagement letters posted on Canvas.

Read ACTEC Commentaries on the Model Rules of Professional Conduct (posted on Canvas) concerning Fees and Conflicts of Interests from representing both spouses in estate planning and representing various intergenerational family members.