



UNIVERSITY OF
FLORIDA

Fredric G. Levin College of Law

PROFESSOR LEE-FORD TRITT

TRUSTS & ESTATES – LAW 6430

Trusts & Estates

Fall 2023

ASSIGNMENTS

WEEK 1

The required text is Sitkoff & Dukeminier, *WILLS, TRUSTS, AND ESTATES* (11th Edition, Aspen Publishers). You may also wish to purchase Thomas P. Gallanis, *UNIFORM TRUST AND ESTATE STATUTES* (Foundation Press). Some students, however, prefer to download the statutes and corresponding commentary instead of purchasing the Uniform Statutes. It's up to you ...

Please register for our Canvas site. Please download and read course Syllabus from Canvas.

Be prepared to discuss the following:

Terms.

1. Testamentary Transfers- pertaining to a Will or Testament. Will is used largely for Testament, but adjective “testamentary” is still used, for example a trust created under a Will is a testamentary trust. A Testamentary transfer is one by Will, as opposed to . . .
2. *Inter Vivos* Transfers – “between the living” (*i.e.*, *inter vivos* trusts, or living trusts)
3. Succession
4. Testamentary Freedom or Freedom of Disposition
5. Intestacy/Intestate – without a Will
6. Testate/Will
7. Trust
8. Bequeath, bequest (legatees) – a gift of personal property in a Will
9. Devise (devisees) – a gift of land.
10. Residuary Estate
11. Gift
12. Decedent
13. Testator/Testatrix

14. Personal Representative (Executor/Executrix;
Administrator/Administratrix)
15. Trustee
16. Probate Property
17. Non-Probate Property
18. “Going through Probate”
19. “Proving a Will”
20. Joint Tenancy
21. Life Insurance
22. Payable on Death (P.O.D.) Contracts

INTRODUCTION TO DONATIVE FREEDOM.

Read Syllabus

Casebook: Pages 1-43, and 51-53

In addition, please also read *Shriners Hospitals v. Zrillic*, 563 So.2d 64 (Fla. 1990)