

Estate Planning Class Begins 18-week Run

The CBA Estate Planning & Probate Committee's popular 18-week "Estate Planning and Drafting Series" kicked off in January with 39 participants. First offered in 2006 and then in 2008, the limited-enrollment course is led by noted local attorneys William Graf and Mark Stiebel and is designed for lawyers who seek a solid understanding of the federal and state law applicable to estate planning and transfer taxation.

During the course, participants will draft numerous clauses and documents, including trust fund formula allocations, marital trust provisions, spendthrift clauses, tax apportionment clauses, powers of appointment, disclaimers, GSTT exempt trust provisions, trustee powers, GRATs, and charitable trust provisions. The course meets every Monday through mid-May.

The CBA offers its deepest appreciation and thanks to Graf and Stiebel for so generously volunteering their time and talent to instruct this course.



Bill Graf, left, and Mark Stiebel, right, lead the class in discussion.



The 39 member Estate Planning & Drafting Class is diverse, including lawyers from solo to large firms, as well as both new and established lawyers.