Online Appendices to:

**TURN-KEY T&E: BUILDING A TRUSTS AND ESTATES PRACTICE**

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Appendices Prepared April 2015 by Brenda Jones, Reference Librarian
Cumberland School of Law, Lucille Stewart Beeson Law Library

**APPENDIX A**

**LIBRARY SERVICES AND ELECTRONIC RESOURCES FOR ATTORNEYS**

LUCILLE STEWART BEESON LAW LIBRARY
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The Lucille Stewart Beeson Law Library is open to attorneys, judges, support staff, and others in the legal community. In particular, we welcome all Cumberland alumni. We ask that guests please register at the Circulation Desk upon entering the building. Law library hours vary based on the semester and holiday schedule. Visit our website at lawlib.samford.edu for links to our current hours, library catalog, the staff directory, and more.

Licensed attorneys who practice in the Birmingham metropolitan area may apply for borrowing privileges. The annual fee for a library card is ten dollars for Cumberland graduates, and twenty-five dollars for all other lawyers. Attorneys outside the Birmingham area may wish to consider interlibrary loan options through their local libraries. Search our web-based catalog to find the description, call number, and location of library resources. Books in the Treatises section on the library’s second floor circulate for a seven-day renewable period. Case reporters, codes, reference books, periodicals, and other items are for in-library use only.

Document scanners and microform equipment are available at the library free of charge. Photocopies are ten cents per page plus a one-dollar fee for a reusable copy card. Desktop computers are available in reading rooms throughout the law library, with attached printers at stations on the first and second floors. For guest access to Samford’s wireless network or other computer-related issues, ask
for the Information Technology Librarian. For help locating and using print or electronic resources, feel free to consult a Reference Librarian.

Visitors present in the law library building may use the following electronic resources, among others. License agreements prohibit remote access for attorneys.

**Lexis and Westlaw**

Not as comprehensive as academic subscriptions, patron-access versions of Lexis and Westlaw nevertheless provide extensive coverage of U.S. primary law. Attorneys may search cases, annotated codes, regulations, constitutions, court rules, and more for all federal and state jurisdictions. The subscriptions also include Shepard’s on Lexis, Keycite on Westlaw, and additional selected resources. Westlaw and Lexis are available at limited designated computer stations on the first floor. Right now, patrons may choose between classic versions of Westlaw and LexisNexis, or the newer interface for WestlawNext.

**HeinOnline**

Attorneys may use HeinOnline to find thousands of full text articles in legal journals, state bar magazines, and American Bar Association publications. Users may retrieve articles by citation, search in full text, or simply browse through journals by volume and issue. Besides legal periodicals, HeinOnline includes a diverse collection of classic law books, federal regulations, state session laws, attorney general reports, U.S. Statutes at Large, Congressional documents, treaties, and more. The one-box option searches across all components of the system.

**LegalTrac and Legal Source**

These bibliographic databases index articles in a broad array of specialized journals, law reviews, legal newspapers, bar magazines, and other periodicals. A welcome bonus for researchers, many indexing records link directly to the full text of the article. Alternatively, the library maintains a collection of legal periodicals in print, shelved on the lower level alphabetically by journal title.

**BNA Premier**

This database offers popular BNA publications like U.S. Law Week, the Lawyers Manual on Professional Conduct, and many others. The heart of the package is a series of Law Resource Centers or Libraries covering many areas of substantive law. One such component is the Tax and Accounting Center. To research gift and estate taxes, follow the tab for Estate Planning. In one convenient spot, users may search cases, statutes, regulations, agency documents, expert analysis, news, and practice-oriented publications like Tax Management Portfolios.
Checkpoint

Provided by Thomson Reuters, Checkpoint covers all types of tax research, including gift and estate taxes. The database combines extensive primary resources with editorial commentary from Thomson’s Research Institute of America. Users will find comprehensive coverage of cases, codes, regulations, rulings, administrative materials, treaties, and analysis for federal, state, and local taxes. The service includes well-known resources like the Federal Tax Coordinator 2d, U. S. Tax Reporter, Federal Tax Handbook, and others.


From author Linda Pinson, this software application allows lawyers to create a customized business plan. Published by the ABA Law Practice Division, the Windows-based program addresses organizational, marketing, and financial elements unique to law firms. The handy navigation bar links to instructions, examples, and templates for all parts of the business plan. Attorneys may access the software at a designated computer station on the library's second floor.
APPENDIX B

Selected List of Books on Starting and Managing a Law Practice

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(Unless otherwise indicated, books listed are in the Treatises section on the second floor.)


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APPENDIX C

Selected List of Books on Legal Technology

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APPENDIX D

Selected List of Books on Trusts and Estates

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(Unless otherwise indicated, books listed are in the Treatises section on the second floor.)

General Works


Tax Law


State Law


