

Online Appendices to:
TURN-KEY T&E:
BUILDING A TRUSTS AND ESTATES PRACTICE

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By Alyssa A. DiRusso

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
CUMBERLAND SCHOOL OF LAW
SAMFORD UNIVERSITY

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.

The Lawyer's Guide to Creating a Business Plan: A Step-by-Step Software Package, 6th ed. 2014.

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

LUCILLE STEWART BEESON LAW LIBRARY
CUMBERLAND SCHOOL OF LAW
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(Unless otherwise indicated, books listed are in the Treatises section on the second floor.)

Altman, Mary Ann, and Robert I. Weil. *How to Manage Your Law Office*. 2 vols. New Providence, NJ: LexisNexis, 1973-. KF318.A758.

Bailey, Joseph A., Jr. et al. *Law Firm Accounting and Financial Management*. 5th ed. New York: Law Journal Press, 2012. KF320.A2 Q55 2012.

Benikov, Alexander Y. *Starting a Law Practice and Professionalism for New Lawyers*. New York: Wolter Kluwer Law & Business, 2013. KF300.B46 2013.

Bullock, Joan R. M. *How to Achieve Success after the Bar Exam: A Step-by-Step Action Plan*. Chicago: ABA Law Practice Division, 2014. KF300.B853.

Cunningham, George C. *The Lawyer's Guide to Records Management and Retention*. 2nd ed. Chicago: ABA Law Practice Division, 2014. KF320.R42 C86 2014.

Cunningham, Lawrence A. *Introductory Accounting for Lawyers*. St. Paul, MN: West Academic Publishing, 2014. KF320.A2 C862 2014.

Dodds, Stuart J. T. *Smarter Pricing, Smarter Profit: A Guide for the Law Firm of the Future*. Chicago: American Bar Association, 2014. KF315.D63.

Elefant, Carolyn. *Solo by Choice, The Companion Guide: 34 Questions That Could Transform Your Legal Career*. Seattle: Lawyer Avenue Press, 2012. KF300.E423 2012.

———. *Solo by Choice: How to Be the Lawyer You Always Wanted to Be*. 2nd ed. Seattle: Decision Books, 2011. KF300.E44 2011.

Evans, Daniel B. *How to Build and Manage an Estates Practice*. 2nd ed. Chicago: American Bar Association, 2008. KF750.E8 2008.

Garfinkle, Marc D. *Solo Contendere: How to Go Directly from Law School into the Practice of Law without Getting a Job*. 3rd ed. Maplewood, NJ: M. Garfinkle, 2010. KF300.G37 2010.

- Gibson, K. William, ed. *Flying Solo: A Survival Guide for the Solo and Small Firm Lawyer*. 5th ed. Chicago: ABA Law Practice Division, 2014. KF298.F34 2014.
- Greene, Arthur G. *The Lawyer's Guide to Increasing Revenue*. 2nd ed. Chicago: ABA Law Practice Management Section, 2011. KF318.G74 2011.
- Guinn, Ann M. *Minding Your Own Business: The Solo and Small Firm Lawyer's Guide to a Profitable Practice*. Chicago: ABA General Practice, Solo & Small Firm Division, 2010. KF318.G85.
- Haskins, Paul A., ed. *Essential Qualities of the Professional Lawyer*. Chicago: ABA Standing Committee on Professionalism, Center for Professional Responsibility, 2013. KF297.E87 2013.
- Hermann, Richard L. *Practicing Law in Small-Town America*. Chicago: American Bar Association, 2012. KF297.H447.
- Kimbro, Stephanie L. *The Consumer Law Revolution: The Lawyer's Guide to the Online Legal Marketplace*. Chicago: ABA Law Practice Management Section, 2013. KF316.5.K56.
- Lambreth, Susan Raridon, and David A. Rueff, Jr. *The Power of Legal Project Management: A Practical Handbook*. Chicago: American Bar Association, 2014. KF318.L255.
- Lockwood, Frank T. *Run Your Firm like a Business: An Operations Guide for Solo Practitioner and Small Law Firm*. Chicago: ABA Solo, Small Firm and General Practice Division, 2013. KF318.L63.
- McDowell, Jonathan. *From Law School to Lawyer: Tools, Procedures, and Steps to Grow Your Practice*. Chicago: ABA Solo, Small Firm and General Practice Division, 2015. KF300.M38 2015.
- Paukert, Kathleen. *The Fulfilled Lawyer: Create the Practice You Desire*. Chicago: American Bar Association, 2014. KF300.P378.
- Pierson, Pamela Bucy. *The Business of Being a Lawyer*. St. Paul, MN: West Academic Publishing, 2014. KF315.P54 2014.
- Poll, Edward. *Attorney and Law Firm Guide to the Business of Law: Planning and Operating for Survival and Growth*. 3rd ed. Chicago: American Bar Association, 2014. KF315.Z9 P64 2014.
- Schmidt, Sally J. *Marketing the Law Firm: Business Development Techniques*. New York: Law Journal Press, 2014. KF316.5.S355.

Shaer, Steven J. *The Lawyer's Guide to Building Your Practice with Referrals*. Chicago: ABA Law Practice Management Section, 2012. KF316.5.S53.

Southers, Eleanor. *Be a Better Lawyer: A Short Guide to a Long Career*. Chicago: American Bar Association, 2014. KF300.S668.

Vercammen, Kenneth. *Smart Marketing for the Small Firm Lawyer*. Chicago: American Bar Association, 2014. KF316.5.V47.

Woldow, Pamela H., and Douglas B. Richardson. *Legal Project Management in One Hour for Lawyers*. Chicago: ABA Law Practice Division, 2013. KF318.W65.

APPENDIX C

Selected List of Books on Legal Technology

LUCILLE STEWART BEESON LAW LIBRARY
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(Unless otherwise indicated, books listed are in the Treatises section on the second floor.)

Allen, Jeffrey, and Ashley Hallene. *Technology Solutions for Today's Lawyer*. Chicago: American Bar Association, 2013. KF320.A9 A428.

Benton, Lynette. *QuickBooks in One Hour for Lawyers*. Chicago: ABA Law Practice Division, 2013. KF320.A2 B46.

Black, Nicole. *Cloud Computing for Lawyers*. Chicago: ABA Law Practice Management Section, 2012. KF242.A1 B575.

Blackford, Sheila M., and Donna S. M. Neff. *Paperless in One Hour for Lawyers*. Chicago: ABA Law Practice Division, 2014. KF318.B53.

Carter, Ruth. *The Legal Side of Blogging for Lawyers*. Chicago: ABA Law Practice Division, 2014. KF320.I57 C37.

Correia, Jared. *Twitter in One Hour for Lawyers*. Chicago: ABA Law Practice Management Section, 2012. KF320.I57 C67.

Ellis, Jennifer. *WordPress in One Hour for Lawyers: How to Create a Website for Your Law Firm*. Chicago: ABA Law Practice Division, 2014. KF320.I57 E45.

Guay, George E., III. *Law Office Technology*. New York: Wolters Kluwer Law & Business, 2014. KF320.A9 G84.

Kennedy, Dennis, and Allison C. Shields. *Facebook in One Hour for Lawyers*. Chicago: ABA Law Practice Management Section, 2012. KF320.I57 K46.

———. *LinkedIn in One Hour*. Chicago: ABA Law Practice Division, 2014. KF320.A9 K46 2014.

Kimbro, Stephanie L. *Virtual Law Practice: How to Deliver Legal Services Online*. 2nd ed. Chicago: ABA Law Practice Division, 2015. KF320.A9 K56 2015.

- Lantz, Jeff. *Internet Branding for Lawyers: Building the Client-Centered Website*. Chicago: ABA Law Practice Management Section, 2012. KF320.A9 L365.
- Mighell, Tom. *iPad in One Hour for Lawyers*. 3rd ed. Chicago: ABA Law Practice Division, 2014. KF320.A9 M48 2014.
- Nelson, Sharon D., David G. Ries, and John W. Simek. *Locked Down: Information Security for Lawyers*. Chicago: ABA Law Practice Management Section, 2012. KF320.A9 N455.
- Nelson, Sharon D., John W. Simek, and Michael C. Maschke. *The 2015 Solo and Small Firm Legal Technology Guide: Critical Decisions Made Simple*. Chicago: ABA Law Practice Division, 2015. KF320.A9 N45 2015.
- Rhodes, Jill D., and Vincent I. Polley, eds. *The ABA Cybersecurity Handbook: A Resource for Attorneys, Law Firms, and Business Professionals*. Chicago: ABA Cybersecurity Legal Task Force, 2013. KF318.A7518.
- Schorr, Ben M. *The Lawyer's Guide to Microsoft Outlook 2013*. Chicago: ABA Law Practice Division, 2013. KF320.A9 S366 2013.
- . *Microsoft Office 365 for Lawyers: A Practical Guide to Options and Implementation*. Chicago: ABA Law Practice Division, 2014. KF320.A9 S367.
- . *Microsoft OneNote in One Hour for Lawyers*. Chicago: ABA Law Practice Management Section, 2012. KF320.A9 S368.
- Siegel, Daniel J. *Android Apps in One Hour for Lawyers*. Chicago: ABA Law Practice Management Section, 2013. KF320.A9 S55.
- Svenson, Ernie. *Adobe Acrobat in One Hour for Lawyers*. Chicago: ABA Law Practice Division, 2013. KF322.S84.
- Unger, Paul J. *PowerPoint in One Hour for Lawyers*. Chicago: ABA Law Practice Division, 2014. KF322.5.M53 U54.
- Yale, Benjamin F. *The Paperless Law Office: A Practical Guide to Digitally Powering Your Firm*. Chicago: American Bar Association, 2012. KF318.Y35.

APPENDIX D

Selected List of Books on Trusts and Estates

LUCILLE STEWART BEESON LAW LIBRARY
CUMBERLAND SCHOOL OF LAW
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(Unless otherwise indicated, books listed are in the Treatises section on the second floor.)

General Works

American Law Institute. *Restatement of the Law Third: Restatement of the Law Property: Wills and Other Donative Transfers*. 3 vols. St. Paul, MN: American Law Institute, 1999 & Supp. 2014. KF657.R49 Reference.

American Law Institute. *Restatement of the Law Third: Restatement of the Law Trusts*. Rev. and enl. ed. 4 vols. St. Paul, MN: American Law Institute, 2003 & App. 2014. KF730.A455 Reference.

Basha, Leigh-Alexandra, ed. *A Guide to International Estate Planning: Drafting, Compliance, and Administration Strategies*. 2nd ed. Chicago: ABA Section of Real Property Trust & Estate Law, 2014. KF750.A2 I575 2014.

Begley, Thomas D., Jr., and Andrew H. Hook. *Representing the Elderly or Disabled Client: Forms and Checklists with Commentary*. Valhalla, NY: Thomson Reuters, 2000 & Supp. 2015. KF390.A4 B442.

Bickel, Dwight F., and Michael T. Flannery. *Living Trusts: Forms and Practice*. New Providence, NY: Matthew Bender, 1993-. KF734.B53.

Burda, Joan M. *Estate Planning for Same-Sex Couples*. 2nd ed. Chicago: American Bar Association, 2012. KF750.B87 2012.

Frank, Jeffrey M., and Sharon A. Sergeant, eds. *The Law of Probate Bonds*. 2nd ed. Chicago: ABA Tort Trial & Insurance Practice Section, 2015. KF765.L39 2015.

Frolik, Lawrence A., and Melissa C. Brown. *Advising the Elderly or Disabled Client: Legal, Health Care, Financial, and Estate Planning*. 2nd ed. Valhalla, NY: Thomson Reuters, 2000-. KF390.A4 F75 2000.

Hendrickson, Robert A., and Neal R. Silverman. *Changing the Situs of a Trust*. New York: Law Journal Press, 1982-. KF731.H46.

- Hess, Amy Morris, George Gleason Bogert, and George Taylor Bogert. *The Law of Trusts and Trustees: A Treatise Covering the Law Relating to Trusts and Allied Subjects Affecting Trust Creation and Administration: With Forms*. 3rd ed. 15 vols. Eagan, MN: Thomson Reuters, 2000-. KF730.B63 2000.
- Horn, Jerold I. *Flexible Trusts and Estates for Uncertain Times*. 5th ed. Chicago: ABA Section of Real Property Trust & Estate Law, 2014. KF730.H67 2014.
- Jordan, Michael L. M. *Drafting Wills and Trust Agreements*. 4th ed. 4 vols. Eagan, MN: Thomson Reuters, 2009-. KF748.1.W55 2009.
- Manning, Jerome A., Anita S. Rosenbloom, Seth D. Slotkin, and Kevin Matz. *Manning on Estate Planning*. 7th ed. New York: Practising Law Institute, 2013-. KF749.M36 2013.
- Murphy, Joseph Hawley. *Murphy's Will Clauses: Annotations and Forms with Tax Effects*. 5 vols. New Providence, NJ: Matthew Bender, 1968-. KF755.A65 M8.
- National Conference of Commissioners on Uniform State Laws. *Uniform Laws Annotated*. Vols. 8-8C, *Estate, Probate and Related Laws*. Eagan, MN: Thompson Reuters, 2013-2014. KF165.A5 U5 Reference.
- Peck, Kerry, Rick Law, Brandon Peck, and Diana Law. *Alzheimer's and the Law: Counseling Clients with Dementia and Their Families*. Chicago: ABA Senior Lawyers Division, 2013. KF3803.A56 P43.
- Price, John R., and Samuel A. Donaldson. *Price on Contemporary Estate Planning*. 2014 ed. Chicago: Wolters Kluwer CCH, 2014. KF749.P74 2014.
- Schoenblum, Jeffrey A. *Anderson's Estate Planning Forms and Clauses*. New Providence, NJ: LexisNexis/Matthew Bender, 2014. KF748.1.S355 2014.
- Scott, Austin Wakeman, William Franklin Fratcher, and Mark L. Ascher. *Scott and Ascher on Trusts*. 5th ed. 8 vols. New York: Wolters Kluwer Law & Business, 2006 & Supp. 2014. KF730.S3 2006.
- Sembler, Frederick M., and Michael J. Feinfeld. *Planning an Estate: A Guidebook of Principles and Techniques*. 4th ed. Eagan, MN: Thomson Reuters, 2014-. KF750.P53 2014-2015.
- Turner, George M. *Irrevocable Trusts*. 3rd ed. 2 vols. Eagan, MN: Thomson Reuters, 1996-. KF730.T87 1996.
- . *Revocable Trusts*. 5th ed. 4 vols. Eagan, MN: Thomson Reuters, 2003-. KF733.T87 2003.

Tax Law

Bittker, Boris I., and Lawrence Lokken. *Federal Taxation of Income, Estates, and Gifts*. 3rd ed. 7 vols. Valhalla, NY: Thomson Reuters, 1999 & Supp. 2014. KF6335.B48 1999 Taxation.

Commerce Clearing House. *Federal Estate and Gift Tax Reporter*. Rev. ed. 5 vols. Chicago: Commerce Clearing House, 1989-. KF6571.A8 F35 Taxation.

Kasner, Jerry A., Benton C. Strauss, and Michael S. Strauss. *Post Mortem Tax Planning*. 3rd ed. 2 vols. Valhalla, NY: Thomson Reuters, 1998-. KF6584.K37 1998 Taxation.

McGaffey, Jere D. *McGaffey Legal Forms with Tax Analysis*. Vols. 3-3A, *Estate and Personal Planning*. Eagan, MN: Thomson Reuters, 1990-. KF6450.A65 M33 Taxation.

Peschel, John L., and Edward D. Spurgeon. *Federal Taxation of Trusts, Grantors, and Beneficiaries: Income, Estate, Gift, Generation-Skipping Transfer*. 3rd ed. Valhalla, NY: Thomson Reuters, 1997-. KF6443.P4 1997 Taxation.

Rabkin, Jacob, and Mark H. Johnson. *Federal Income, Gift, and Estate Taxation*. 5 vols. New Providence, NJ: Matthew Bender, 1942-. KF6335.R31 Taxation.

Research Institute of America, Inc. *Estate Planning & Taxation Coordinator*. 7 vols. New York: Thomson Reuters/Tax & Accounting, 1978-. KF6571.A8 E8 Taxation.

Tax Management Memorandum. Tax Management Portfolios: Estates, Gifts, and Trusts. Arlington, VA: Tax Management Inc., 1974-. KF6289.A1 T35 Taxation.

Westfall, David, and George P. Mair. *Estate Planning Law and Taxation*. 4th ed. Valhalla, NY: Thomson Reuters, 2001-. KF6584.W47 2001 Taxation.

State Law

Benefield, Steven A., Gay Blackburn Maloney, and Thad Davis. *Probate Process from A to Z (Alabama)*. Eau Claire, WI: National Business Institute, 2010. KFA144.P75 2010 Reserve.

Davis, Penny A., ed. *Handbook for Alabama Probate Judges*. 8th ed. Tuscaloosa, AL: Alabama Law Institute, 2007. KFA144.Z9 H35 2007 Reference and Reserve.

Hinkel, Daniel F. *Georgia Probate and Administration: With Forms*. 4th ed. Eagan, MN: Thomson Reuters, 2010 & Supp. 2014. KFG144.A65 J44 2010.

Lee, Hugh M., and Jo Alison Taylor. *Alabama Elder Law*. 2014-2015 ed. Eagan, MN: Thomson Reuters, 2008-. KFA91.A3 A153 2014-2015 Reference.

McCurley, Robert L. *Alabama Law Office Practice Deskbook*. 11th ed. Tuscaloosa, AL: Lawyers Educational Press, 2010 & Supp. 2014. See esp. chap. 31, "Administration of Estates" and chap. 32, "Probate of Wills." KFA77.M3 2010 Reference.

———. *Real Estate Handbook: Land Laws of Alabama*. 9th ed. New Providence, NJ: LexisNexis, 2014. See esp. chap. 3, "Administration of Estates" and chap. 39, "Probate of Wills." KFA112.M33 2014 Reference.

Nettles, Thomas A. *Alabama Probate Law and Procedure: The Administration of Estates*. Tuscaloosa, AL: CLE Alabama, 2012. KFA144.N32 2012 Reference.

Radford, Mary F. *Redfearn Wills and Administration in Georgia*. 7th ed. 2 vols. Eagan, MN: Thomson Reuters, 2008 & Supp. 2014-2015. KFG144.R4 2008.

Robinson, Jack W., Sr., Jeffrey Mobley, and Andra J. Hendrick. *Pritchard on the Law of Wills and Administration of Estates: Embracing the Law and Practice in Tennessee*. 7th ed. 3 vols. New Providence, NJ: LexisNexis, 2009 & Supp. 2014. KFT144.P72 2009.

Sparber, Byron L., Carl H. Cofer, and Thomas A. Ritchie, eds. *Southeast Transaction Guide: Florida, Georgia, Alabama*. Vols. 5-8, *Estate Planning*. New Providence, NJ: Matthew Bender, 1976-. KF1410.S6 Reserve.

Trawick, Henry P., Jr. *Trawick's Redfearn Wills and Administration in Florida*. 2014-2015 ed. Eagan, MN: Thomson Reuters, 1999-. KFF144.R45.