Drafting Wills and Trust Agreements
4th Edition
by
Michael L.M. Jordan

PART ONE. DRAFTING TECHNIQUES FOR ESTATE PLANNERS
Chapter 1. Basic Estate Planning Concepts and Drafting Techniques
Chapter 2. Changing Landscape of Estate Planning
Chapter 3. Estate Planning Techniques for Small and Moderate-Sized Estates
Chapter 4. Estate Planning Techniques for Taxable Estates
Chapter 5. Special Drafting Considerations
Chapter 6. Planning for Generation-Skipping Transfers

PART TWO. DRAFTING SCENARIOS FOR ESTATE PLANNERS
Chapter 7. Use of Estate Planning Drafting Scenarios
Chapter 8. Drafting Scenarios for Married Individuals with Children
Chapter 9. Drafting Scenarios for Married Individuals with No Children
Chapter 10. Drafting Scenarios for Unmarried Couples with No Children
Chapter 11. Drafting Scenarios for Non-Traditional Couples with Children
Chapter 12. Drafting Scenarios for Single Individual with Children
Chapter 13. Drafting Scenarios for Single Individual with No Children
Chapter 14. Drafting Scenarios for Decoupled States (State Estate Tax Exemption Set Below the Federal Estate Tax Exemption Amount)

PART THREE. DRAFTING ESTATE PLANNING DOCUMENTS—DESCRIPTION, BACKGROUND, AND USE
Chapter 15. Drafting System Approach
Chapter 17. Short Form Will
Chapter 18. Pourover Will
Chapter 19. Revocable Single Settlor Trust
Chapter 20. Revocable Joint Property Trust
Chapter 21. Revocable Community Property Trust
Chapter 22. Revocable Qualified Domestic Trust
Chapter 23A. Revocable Pet Trust
Chapter 24. Irrevocable Long-Term GST (Dynasty) Trust
Chapter 25. Irrevocable Crummey Trust/Irrevocable Life Insurance Trust
Chapter 26. Irrevocable 2503(c) Trust for Minors
Chapter 27. Irrevocable Charitable Lead Trust
Chapter 28. Irrevocable Charitable Remainder Trust
Chapter 29. Irrevocable Grantor Retained Trust
Chapter 30. Irrevocable Intentionally Defective Grantor Trust
Chapter 30A. Irrevocable Spousal Lifetime Access Trust
Chapter 31. Irrevocable I.R.A. Management (Conduit) Trust
Chapter 32. Irrevocable Supplemental Needs Trust
Chapter 32A. Irrevocable Qualified Income Trust (“Miller Trust” or “Income Gap Trust”)
Chapter 32B. Irrevocable Income Only Trust
Chapter 33. Irrevocable Qualified Personal Residence Trust
Chapter 34. Amending Documents
Chapter 35. Client Letters