

REFERENCE SHELF

RESOURCES ON WILLS AND LIVING TRUSTS

Writing a will—or alternatively, a living trust—is an essential task, but not a simple one to carry out. An attorney is necessary to ensure that your document will be legally valid when needed. However, you shouldn't enter the process completely in the dark. With a little study using the following re-

sources, you can help guide your lawyer so that your will or living trust contains the elements you wish.

The *AAIL Journal* articles, books and Web sites listed contain reading material to get you started. A few of the Web sites contain lists of lawyers that specialize in estate planning; however, use

these lists with prudent caution.

For those who enjoy delving into the tax code, the Internal Revenue Service (800/829-3676, www.irs.ustreas.gov) and CCH Inc. (800/835-5224, www.cch.com) offer publications explaining tax regulations.

—Jean Henrich

AAIL JOURNAL ARTICLES

Past articles can be purchased for \$4 each by calling 1-800-428-2244. Articles will also be available on our Web site at www.aail.com.

“Funding Living Trusts: How to Change Titles and Beneficiary Designations,” by Jim and Vickie Schumacher, August 1995, p. 11.

“The Individual Investor’s Guide to Estate Planning: Three Part

Series, by Richard J. Jurgovan, February 1990, p. 20; May 1990 p. 14; and August 1990, p. 19.

“A Look at Living Trusts: Willing Alternatives,” by Michael Leonetti, January 1990, p. 21.

BOOKS

ABA Guide to Wills and Estates, by the American Bar Association. Published in 1995 By Random House/Times Books, 400 Hahn Rd., Westminster, MD 21157, 800/726-0600. 240 pages paperback; \$12.00. ISBN: 0-8129-2536-X

Make Your Own Living Trust, by Denis Clifford. Published in 1996 by Nolo Press, 950 Parker Street, Berkeley, CA 94710, 800/955-4775. 336 pages paperback; \$21.95. ISBN: 0-87337-194-1

Understanding Living Trusts, by Jim and Vickie Schumacher. Published in 1996 by Schumacher Publishing, 3000 Ocean

Park Blvd., Suite 1070, Dept. 15, Santa Monica, CA 90405, 800/728-2665, Ext. 15. 288 pages, paperback; \$24.95.

The Truth About Living Trusts, by Nan L. Goodart. Published in 1995 by Dearborn Financial Publishing; Publishers Book and Audio, P.O. Box 070059, Staten Island, NY 10307, 800/829-7934. 157 pages paperback; \$16.95. ISBN: 0-7931-1344-X

The Will Kit, by John Ventura. Published in 1996 by Dearborn Financial Publishing; Publishers Book and Audio, P.O. Box 070059, Staten Island, NY 10307, 800/829-7934. 224 pages paperback; \$17.95. ISBN: 0-7931-1684-8

WEB SITES

American Bar Association: Look for consumer information on wills and living trusts. www.abanet.org

American College of Trust and Estate Counsel: Organization of lawyers and law professors who specialize in estate planning. www.actec.org

California Estate Planning, Probate & Trust Law: List of 250 estate law attorneys on the Web covers all states. www.ca-probate.com

FindLaw Internet Legal Resources: Articles and courses in wills and living trusts. www.findlaw.com

Nolo’s Legal Encyclopedia: Excerpts from books on wills and living trusts. Information on related books and software products. www.nolo.com

Trust Counselors’ Network Inc.: Organization of attorneys specializing in living trusts and estate planning. Educational articles on estate planning topics. www.trustcounsel.org