



Trusts & Estates Guide

Colorado Materials:

Buchanan, Susan and D. Wayne Stewart, ed. Colorado Handbook of Elder Law. 3d ed. Denver, CO: Continuing Legal Education in Colorado, 2004-. **Level 3 KFC 11891 .A3 C644** (periodic loose-leaf updates), Level 2 Reserve (Glatstein, Carl)

Estate Planning Basic Skills. Denver, CO: Continuing Legal Education in Colorado, Inc., 2000, 2004, 2005, 2008, annual Continuing Legal Education program. **Level 3 KFC 1940 .Z9 E853**, CD-ROM Level 2 Reserve

Estate Planning Forms Committee of the Colorado Bar Association Trust and Estates Section. Colorado Estate Planning Handbook, 5th ed., also known as The Orange Book. Denver, CO: Continuing Legal Education in Colorado, Inc., 2004-. **Level 3 KFC 1940 .A65 C63** (periodic loose-leaf updates)

Estate Planning Forms Committee of the Colorado Bar Association Trust and Estates Section. Colorado Estate Planning Forms, also known as The Orange Book Forms. Denver, CO: Continuing Legal Education in Colorado, Inc., 2001-. **Level 3 KFC 1940 .A65 C63** (periodic loose-leaf updates), CD-ROM Level 2 Reserve

Johns, David K., ed. The Green Book: Selected Colorado Materials on Wills, Estates, Trusts and Taxes. Denver, CO: Continuing Legal Education in Colorado, 2004-. **Level 3 KFC 1947.A33** (Periodic loose-leaf updates), CD-ROM Level 2 Reserve

Masters, Mark D. ed. Colorado Will and Estate Planner. Denver, CO: Bradford Pub. Co., 2004. **Level 3 KFC 1940.A65 C666**, CD-ROM Level 2 Reserve

Schmidt, L. William. Preserving Your Wealth: A Guide to Colorado Probate & Estate Planning. Denver, CO: Bradford Pub. Co., 2003. **Level 3 KFC 1944 .S36**

Stewart, C. Jean Colorado Estate Planning, Will Drafting and Estate Administration Forms: Practice. 2nd ed. 2 vols. Charlottesville, VA: LEXIS Law Pub. 1998- **Level 3 KFC 1940 .A65 S74** (Periodic loose-leaf updates, current 2005), CD-ROM #10 2008 Level 2 Reserve

Wade, James R. and Howard E. Parks. Colorado Law of Wills, Trusts, and Fiduciary Administration. Denver: Continuing Legal Education in Colorado, Inc., 2004-. **Level 3 KFC 1944 .W323** (Periodic loose-leaf updates, current 2006.)

Wade, James R. Colorado Probate System. Denver: Continuing Legal Education in Colorado, Inc., 2003-. **Level 3 KFC 1944 .W33** (Periodic loose-leaf updates), CD-ROM Level 2 Reserve

Nutshells:

Averill, Lawrence H., Jr. Uniform Probate Code in a Nutshell. 5th ed. West's Nutshell Series. St. Paul, MN: West Group, 2001. **Level 3 Reference KF 765 .Z95 .A94** (1987, 1993, 1996 shelved in the stacks by call number)

Lynn, Robert J. and Grayson M.P. McCouch. Introduction to Estate Planning in a Nut Shell. West's Nutshell Series. St. Paul, MN: West Group, 2004. **Level 3 Reference KF 750 .Z9 L9** (1983 shelved in the stacks by call number)

Waggoner, Lawrence W. Estates and Future Interests in a Nutshell. 3d ed. West's Nutshell Series. St. Paul, MN: Thomson/West Group, 2005. **Level 3 Reference KF 605 .W33**

Restatements:

Restatement of the Law, Second, of Property: Wills & Other Donative Transfers St. Paul, MN: American Institute Publishers, 1999-. Restatement of the Law, Third, of Property: Wills & Other Donative Transfers **Level 3 KF 755 .R475, KF 561.A88, KF 561.A922**. (Updated with pocket parts.)

Restatement of the Law, Second, of Trusts, 2003-. Restatement of the Law, Third, of Trusts, St. Paul, MN: American Law Institute. **Level 3 KF 730 .A86** (Updated with pocket parts, supplements, current 2008.)

Hornbooks:

McGovern, William M., Jr. and Sheldon F. Kurtz. Wills, Trusts and Estates: Including Taxation and Future Interests. 2nd ed. (2001) and 3d ed. (2004) and 4th ed. (2005) Hornbook series. St. Paul, MN: West Group, 2004. **Reference Level 3 KF 755 .M342**, Level 2 Reserve

General Books and Treatises:

Marsh, Lucy. Practical Applications of the Law: Wills, Trusts, and Estates. New York, NY: Aspen Law & Business, 1998. **Level 2 Reserve: Marsh, Lucy**

McWilliams, Marilyn. Life After Death: A Legal and Practical Guide for Surviving Spouses. Denver, CO: Bradford Pub. Co., 2005. **Level 1 and Level 3 HQ1058.5 .U5 M36**

Pennell, Jeffrey N. Estate and Trust Planning. Chicago, IL: Section of Real Property, Probate, and Trust Law, ABA, 2005. **Level 3 KF 750 .P46**

Weinstock, Harold and Martin A. Newmann. Planning an Estate: A Guidebook of Principles and Techniques. 4th ed. rev. St. Paul, MN: Thomson/West, 2002. **Level 3 KF 750 .W43** (Updated with pocket parts)

Wilkins, Robert P. Drafting Wills and Trusts Agreements. 3rd ed. Tax and estate planning series. 4 vols.; 4 computer disks in vol. 3. Colorado Springs, CO: Shepard's/McGraw-Hill, 1995-
Level 3 KF 748.1 .W55 (Periodic loose-leaf updates)

Wills:

Clifford, Denis. Berkeley, Calif.: 6th ed. Nolo's Simple Will Book . **Level 3 KF755.Z9 C54 2007**, CD-ROM

Page, William Herbert. Page on the Law of Wills: Including Probate, Will Contests, Evidence, Taxation, Conflicts, Estate Planning, Forms, and Statutes Relating to Wills. Rev. treatise by William J. Bowe and Douglas H. Parker. CD-ROM contains estate planning forms and clauses. Cincinnati: W.H. Anderson Co., 1960-. **Level 3 KF 755 .P34**. (Multivolume, updated with supplements, appendix, current 2005.)

Trusts:

Bogert, George Gleason. 7th ed. Cases and Text on the Law of Trusts. University casebook series, 2001. **Level 3 Reference KF 729 .B6**

Freitag, Carla Neeley. The Funding of Living Trusts. Chicago: ABA Pub., 2004. American Bar Association Section of Real Property, Probate, and Trust Law. **Level 3 KF 734 .F74**

Hayes, Eric. Loring: A Trustee's Handbook. Boston: Little, Brown, 1996-2006. (Multivolume treatise updated annually). **Level 3 KF 730 .L62**

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. St. Paul, MN: West Group, 2000-. **Level 3 KF 730 .B633** (Updated with pocket parts and revised volumes)

Hunter, Laurie A. Gifts to Minors. 1st ed. Denver, CO: CLE in CO. 2007- (loose-leaf). **Level 3 KFC 1937.H88**

Payne, Carol A. Fundamentals of Colorado Trust Practice: Counseling Clients, Drafting Trusts, and Building a Successful Practice. Denver, CO: Bradford Pub. Co. 2004- (loose-leaf) **Level 3 KFC 1937 .P39**, 2006 CD-ROM Level 2 Reserve

Scott, Austin Wakeman and William Franklin Fratcher. Scott and Ascher on Trusts. 5th ed. Boston: Little, Brown, 1987-. **Level 3 KF 730 .S34** (multivolume treatise updated with pocket parts and supplements)

Estates and Taxation:

Casner, A. James and Jeffrey N. Pennel. Estate Planning. 6th ed. 3 vols. New York, NY: Aspen Law & Business, 1995-. **Level 3 KF 6584 C376** (Periodic loose-leaf updates)

Estate Planning and Taxation Coordinator. New York: Research Institute of America, 1978-. **Level 3 KF 6581.5 .R43** (7 volume treatise, updated with supplements, current 2008, plus Alert newsletter.)

Guide to Practical Estate Planning. 2 vols. Fort Worth, TX: Practitioners Pub. Co., 2001-. **Level 3 KF 6581.5 .G84** (Periodic loose-leaf updates)

Philip C. Heckerling Institute on Estate Planning. The Annual Philip C. Heckerling Institute on Estate Planning. New York: Matthew Bender, 1984-. **Level 3 KF 6584 .A2 I58** (Loose-leaf, new volume added annually)

Tax Management Estates, Gifts and Trusts Journal. v. 9 (1984)-. Washington, D.C.: Tax Management, Inc., 1984-. **Level 3 KF6571 .A15 E8**

Tax Management Portfolios: Estates, Gifts and Trusts Index. Washington, D.C.: Tax Management. **Level 3 KF 6289 .A1 T35** (Portfolios kept up-to-date by inserts and replacement volumes, also available on library homepage under databases>BNA)

Westfall, David and George P. Mair; chapter 13 contributed by Rebecca J. Benson; with forms by Georgiana J. Slade and James S. Sligar. Estate Planning Law and Taxation. 4th ed. Valhalla, NY: Warren, Gorham & Lamont, 2001. (1 volume loose-leaf, updated periodically, includes computer disk, current 2005.)

Level 3 KF 6584 .W47

Estate Planning for Non-Traditional Relationships:

Auger, Jeanette A.. Passing Through: End-of-Life Decisions of Lesbians and Gay Men. Black Point, NS: Fernwood Pub., 2003. **Level 1 HQ76 .A84**

Brashier, Ralph C.. Inheritance Law and the Evolving Family. Philadelphia: Temple University Press, 2004. **Level 3 KF 755 .B73**

Burda, Joan M.. Estate Planning for Same-Sex Couples. American Bar Association, 2004. **Level 3 KF 750 .B87** (Computer disk included.)

General- Internet Links:

American Bar Association:

Probate and Property: The Magazine of the Real Property, Probate and Trust Law Section of the American Bar Association. v. 1 (1987)-. Chicago: American Bar Association, Real Property, Probate and Trust Law Section, 1987-. Six issues per year.

<http://www.abanet.org/rppt/publications/magazine/home.html>

Section of Real Property, Probate and Trust Law:

<http://www.abanet.org/rppt/home.html>

Cornell Law School, Legal Information Institute:

Estate Planning: An Overview:

http://www.law.cornell.edu/wex/index.php/Estate_Planning

Crash Course in Wills and Trusts . . . the estate planning information you need:

<http://www.mtpalermo.com/> AARP

Bradford Publishing Company via Westminster Law Library Webpage

<http://www.law.du.edu/forms/library/count2.cfm?LinkURL=http://eproducts.bradfordpublishing.com/index.html>

Click Databases/Indexes – Go – Bradford Legal Forms.

General- Periodicals:

ALI-ABA Estate Planning Course Materials Journal: CMJ EP. V.1 (1995)-. Philadelphia, PA: American Law Institute-American Bar Association Committee on Professional Education, 1995-. **Level 1 K 1.L59**

Estate Planning. v. 1 (1973)-. Boston, MA: Warren, Gorham & Lamont for Estate Planning Research Group, Ltd., 1973-. **Level 1 K 5.S71**

Probate and Property: The Magazine of the Real Property, Probate and Trust Law Section of the American Bar Association. v. 1 (1987)-. Chicago: American Bar Association, Real Property, Probate and Trust Law Section, 1987-.

Level 1 K16 .R41

Real Property, Probate and Trust Journal : RPPTL Newsletter. v. 1(1966)-. Chicago: Section of Real Property, Probate and Trust Law, American Bar Association, 1966-.

Level 1 K 18 .E25

Trusts and Estates, v. 86 (1948)-. Atlanta, GA: Communication Channels, Inc., 1939-.

Level 1 K 24 .R58