

REQUEST FOR PROPOSALS

ACTEC FOUNDATION 2025-2026 ACADEMIC SYMPOSIUM

The Legal Education Committee of the American College of Trust and Estate Counsel (ACTEC) requests proposals for a \$20,000 grant to host an academic symposium on trust and estate law during the 2025-2026 academic year.

The ACTEC Foundation Symposium is intended to be the premier academic symposium on trust and estate law in the United States. The goals of the symposium are to stimulate development of scholarly work in trust and estate law, bridge the gap between the academic community and practitioners, provide opportunities for junior academics to present papers and interact with more senior academics, provide an opportunity for trust and estate professors to interact with each other, involve academics from other disciplines in discussions of trust and estate topics, and strengthen ACTEC's image as the leading organization for trust and estate lawyers, both practitioners and academics.

RFPs are due by Thursday, August 1, 2024, and will be considered by the Symposium Subcommittee of the ACTEC Legal Education Committee during or around ACTEC's Fall Meeting in Chicago, Illinois, in September 2024. Please submit RFPs (RFP content and guidelines are set forth below) to the co-chair of the ACTEC Legal Education Committee, Prof. Gerry W. Beyer, at gwb@professorbeyer.com.

All submissions should be in electronic form, pdf preferred (subject line of email should read "ACTEC Symposium RFP").

1. RFP Content

The RFP should provide the following information.

A. Theme. The theme of the symposium must be related to trust and estate law, defined to include any topic related to the gratuitous transfer of property (e.g., probate law, trust law, elder law, transfer tax law). A broad theme permits a wide range of papers and is more likely to be successful. Past themes have included *Trust Law in the 21st Century* (Cardozo 2005); *Inheritance Law in the 21st Century* (UCLA 2008); *Philanthropy Law in the 21st Century* (Chicago-Kent 2009); *The Uniform Probate Code: Remaking of American Succession Law* (Michigan 2011); and *The Role of Federal Law in Private Wealth Transfer* (Vanderbilt 2014), *The Centennial of the Estate Tax: Perspectives and Recommendations* (Boston College Law School 2015), *Wealth Transfer Law in Comparative and International Perspective* (Iowa Law 2017), and *Conflict of Laws in Trusts and Estates* (Tulane, 2022).

In connection with identifying a theme for the symposium, the RFP should indicate the types of topics that might be presented. Actual topics may depend, in part, on paper proposals but it will be helpful for the RFP to illustrate the scope of the theme.

B. Host Law School and Faculty Member(s). The proposal should identify the law school that will host the symposium and one or two faculty members at the host school who agree to manage the logistics of the symposium. The faculty member(s) proposing the symposium will need to make all the arrangements with the law school, the law review or journal, and the speakers.

C. Publication. Symposium papers must be published so the exchange of ideas can be shared beyond those who are able to attend the symposium. An important part of the RFP is a commitment, to

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the extent possible, from a law review at the host school to publish the papers as a symposium issue. The law review can be either the primary journal or a secondary journal at the host law school. The Legal Education Committee is aware of the difficulty of obtaining a commitment from a journal board to publish papers in an issue that will be managed by another board and is open to whatever strategies may work.

2. Guidelines for the Symposium

The Legal Education Committee has developed guidelines for the symposia and the host faculty should plan to follow these guidelines, with discretion with respect to details. Guidelines with pointers on various aspects of the symposia are available, but the key items the proposed host should be aware of before submitting an RFP are set forth below.

A. Call for Papers. After the host law school is selected, the faculty member managing the symposium will issue a Call for Papers. The faculty member may want to secure commitments for papers from a few speakers first, and the call for papers need not be for all papers, but the call for papers should be used to determine a substantial number of the presenters. The Legal Education Committee can assist in circulating the call for papers, to help make the process as wide a call as possible.

The faculty member managing the symposium, in consultation with the Symposium Subcommittee (consisting of several members of the Legal Education Committee), will choose the presenters based, in general, on the following criteria:

- Connection to the theme
- Interesting, innovative research
- Importance of research
- Junior scholars/senior scholars/a mix
- Gender balance/diversity

In addition to the papers, a luncheon speaker and commentators should be selected. These presenters may, but need not, come from the group that submitted paper proposals. Depending on the theme and the topics of the papers, it may be appropriate to ask one or two practitioners to be commentators or the luncheon speaker.

B. Budget. The budget for past symposia has provided the speakers and commentators with travel (ground transportation to and from airports, coach air travel or mileage for driving, and hotel for one or two nights, as needed by the speaker). Speakers have been invited to a dinner Thursday evening and on Friday breakfast and lunch are provided to all attendees. Speakers have not been reimbursed for other expenses, such as meals en route to the symposium. There are some additional costs for publicity and materials (ACTEC helps with production and distribution of publicity).

The Foundation will transfer \$20,000 to the host school, and the host school will be responsible for managing the grant, paying expenses for the symposium, and filing a detailed accounting including receipts with the Foundation after the symposium. In the past, the grant has been sufficient to cover all expenses.