Wills for the Underserved: A Mentorship Program

Manual of Instructions and Templates

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UNIVERSITY OF OREGON | School of Law

Wills for the Underserved: A Mentorship Program

Introduction to the Manual

This Manual provides templates and tools to assist a law school that wants to start a Wills for the Underserved program. The goal is to provide as much guidance as possible, with the knowledge that every program will be different. The documents were created at the University of Oregon School of Law, but logos and letterhead from most of the documents have been removed to make the documents easier to use. A couple of the development tools have University of Oregon identifying information, but you can easily replace that with your own school's name.

The Wills for the Underserved program introduces law students to estate planning work and helps community members obtain basic estate planning documents. The program operates at a minimal cost to the law school in terms of time and money, while providing students with valuable practical experience in client interviewing and transactional drafting. The program does not require the infrastructure of a law school clinic and does not require that level of time commitment from the student participants. The program depends on volunteer attorneys, so the goal is to keep their time commitment modest as well.

Wills for the Underserved assists people who need but cannot afford basic estate planning. Even people with minimal assets may want to nominate a guardian for minor children and create a testamentary trust for the children if the parents die. Clients may have family situations not well served by the intestacy statutes and may want property to go to those people closest to them and not to intestate heirs. Further, clients will benefit from an understanding of how will substitutes and wills interact. Simply providing a will is not sufficient unless the testator understands which property will pass under the will.

The Wills for the Underserved program has been a rewarding one at the University of Oregon. Students appreciate the opportunity to work with lawyers to assist local people with estate planning needs. The lawyers have been gracious about volunteering their time, and their connection with the law school has been strengthened. And everyone involves appreciates knowing that a few more people who would not otherwise have had access to a lawyer now have estate planning documents in place.

With best wishes for a successful program,

Susan N. Gary
Orlando J. and Marion H. Hollis Professor of Law

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Wills for the Underserved

Overview:

The Wills for the Underserved Program offers a unique opportunity to lawyers, students, and community members. This program provides people in underserved populations with pro bono estate planning assistance that includes wills, advanced directives, and durable powers of attorney. In this program, a volunteer attorney works with a trained law student during the process of interviewing the client and drafting the documents. The law students gain an understanding of the practical work of estate planning, and the lawyers offer valuable insights while providing the oversight necessary to protect the clients. This program creates mentorship opportunities, which benefit both the mentor-attorney and the law student, and it exposes students to the benefits of working with the underserved.

Goals:

- Provide estate planning services for underserved populations.
- Introduce students to estate planning and train them in interviewing and drafting skills.
- Foster mentorship relationships between law students and attorneys.

The Underserved:

- Low-income clients screened by local nonprofit law firms or legal aid offices; or
- Veterans; or
- First responders (firefighters and police officers).

Services Provided:

- A lawyer-student team will review beneficiary designations and other non-probate transfers. The team will coordinate all documents involved in the estate plan.

- The team will draft a non-tax planning Will, which may include a trust for minor children.

- The team may also prepare a durable power of attorney and an advance directive.

- A lawyer may agree to provide services beyond the basic documents (either pro bono or for a fee) but is not expected to do so. For example, the expectation is that the teams will not draft revocable trusts, but a lawyer could agree to do so for a particular client.

The Estate Planning Fellow's role (with the assistance of a professor or other supervisor):

- Coordinates the program, including networking, managing materials, record-keeping, and assisting with promotion and support.
- Recruits students for the program and oversees both orientation and qualifications.
- Assists in supervising training sessions for the students. The ABA-RPTE Estate Planning Toolbox videos are used for the training, supplemented with exercises and discussion.
- Arranges supplemental training sessions in which guest speakers who have previously participated in the program, either as attorneys or students, offer advice and insights about estate planning.
- Assists in contacting referral sources and maintains relationships with these sources.
- Pairs students with lawyers and makes introductions by email. The student is responsible for contacting the lawyer, but the Fellow remains available to assist and answer questions.
- Manages record keeping and assists with reporting pro bono hours for lawyers and students.

The Lawyer's Role:

- Each participating lawyer agrees to work with a law student to provide estate planning services to one client on a pro bono basis. (If the project operates more than once a year, a lawyer might decide to participate more often.)
- The lawyer mentors the law student in connection with the work for the client. The lawyer leads or supervises the client interview, discusses the planning options with the student, reviews all documents prepared by the student, and supervises all work done by the student.
- The lawyer ensures that the work is completed in a timely manner and that the client has the opportunity to execute the documents, supervised by the student and the lawyer.

The Student's Role:

- The student makes the initial contact with the lawyer and meets with the lawyer as the lawyer directs.
- The student meets with the client (with the lawyer), discusses the planning with the lawyer, and then drafts the proposed documents. The student revises the documents as directed by the lawyer and ensures timely completion of the work.
- A student can participate more than once (each semester or both second year and third year), if the number of lawyers and clients is sufficient.

Wills for the Underserved – Timeline

The following timeline provides a recommended outline of goals for the beginning stages of the program and then a timeline for the program year. This timeline is simply a guideline, and each program will be slightly different. A dilemma for the school and the supervisor is that the pieces of the program all depend on each other. The Estate Planning Fellow plays an important role in the program, so funding the fellowship is important, but potential funders may want to see results before making contributions. The program must identify volunteer attorneys, interested students, and appropriate clients before getting started, but the process of getting people ready to participate at the same time may be difficult. The first year will be complicated, but the program should run more smoothly after two or three years.

Preliminary Steps

- Get the law school's approval for the program.

- Identify the professor, administrator, or community member who will supervise the program. This person is referred to in this timeline as the Supervising Professor.

- Secure funding for Estate Planning Fellow. The law school may be able to commit funds for a small stipend, or the school may prefer to use external funding to provide the fellowship. If the school has an administrator who can handle the administrative work, an Estate Planning Fellow is not essential to the program, but the fellowship does provide a nice opportunity for the Fellow. If a faculty member will be responsible for the program without administrative assistance, the Fellow is essential.

Prior to First Program Year – Supervising Professor

- Identify available clients and potential client pools. Sources may include local non-profit organizations, low-income retirement facilities, women's shelters, legal aid organizations, and other community resources who routinely correspond with underserved communities.

- Contact local attorneys. Contacts can include targeted mailings, events hosted by the law school or local organizations, or direct contacts made by the Estate Planning Fellow or Supervising Professor. The Supervising Professor may prefer to make all initial contacts with attorneys before handing off the correspondence to the Estate Planning Fellow.

- Select Estate Planning Fellow. Typically, the program will advertise to fill the Estate Planning Fellowship in the spring semester preceding the fellowship year. The Supervising Professor, perhaps working with a committee, accepts applications, interviews applicants, and appoints the Estate Planning Fellow. After the program has been operating, priority for the fellowship may be given to students who participated in the program during their 2L year.

Fall Semester (or Fall Quarter if a school follows the quarter system)

Estate Planning Fellow, working with the Supervising Professor

- Email students. The goal of the initial student emails is to establish interest in the program in the student body and to set forth the benefits of the program. This mailing should not be limited to students with an expressed interest in Estate Planning. The outreach to students can recruit life-long volunteers and connect students with underserved populations in the community.

- Introductory session. The first session is an opportunity to lay out the benefits of the program, especially those pertaining to pro-bono hours, connections with local attorneys, experience in drafting, and exposure to underserved populations. Taking attendance and requiring students to participate in some form of orientation (either one-on-one or at a planned session) improves retention of students for the duration of the program.

- Training sessions. Each university may handle the training in a slightly different manner, but most programs will find that the Estate Planning videos provided by the ABA-RPTE Section create an excellent foundation for training. The three one-hour videos provide students with valuable information and offer the overseeing Faculty Member substantive discussion pieces. Students can join the ABA and several sections for free. By joining the RPTE Section, students will have access to the videos.

In addition to requiring that students watch the videos, students will benefit from one or two additional training sessions, conducted by the Supervising Professor with the help of local attorneys. Trainings can cover the estate planning process, client interviewing, and cultural competency. Training in cultural competency related to the likely backgrounds of clients will be useful, because a client's religious practice or ethnic and cultural background can affect the estate planning.

- Pairing. After the completion of the training sessions, the Fellow pairs each student with a participating attorney. A client can be assigned to each pair as soon as a client is available. The goal is to complete the training and client work early in the semester, before the students are too busy.

- Assigning clients. As soon as the Fellow receives client information from one of the referral sources, the Fellow should assign the client to an attorney-student team and let the referral source know that the assignment was made. The program may want to establish a priority system, in case the program receives an insufficient number of clients. Giving priority to 3Ls and to students who have not yet worked with a client in the program makes sense. If a sufficient number of attorneys and clients are available, a student may be given the opportunity to work with a second client. For example, the student might work with one client as a 2L and another client as a 3L. After a student has completed work with one client, the student can be assigned to a new attorney, so that the student has an opportunity to work with different attorneys.

Student-Attorney Teams

- After the Fellow pairs a student with an attorney, the student is responsible for contacting the attorney. Once a client is assigned, the student must immediately (within two days is a good protocol) contact the client and arrange for the initial meeting with the attorney. The student is responsible for the contact with the client and for scheduling.

- The student and attorney should meet prior to the initial intake with the client to go over forms, discuss intake procedures, and plan the interview. This meeting can take place just before the client meeting; scheduling the two meetings together seems most efficient. Attorneys will probably prefer to handle the initial client meeting and use the meeting as a teaching opportunity. The student attends the meeting and learns through observing how the attorney interacts with the client. Some attorneys may instead prefer to have the student lead the interview in the client meeting.

- The student, with oversight by the attorney, drafts the documents and schedules a time for the client to sign. Some attorney-student pairs may choose to schedule additional time after the client signing during which they can discuss the process and the student may ask questions or seek additional feedback.

- After the completion of the client work, the student returns the information sheet to the Estate Planning Fellow.

Follow-up – Estate Planning Fellow

- The Fellow tracks the pro-bono hours (for both the student and the attorney) and maintains records for the clients served. The Fellow also contacts the client referral source to let them know the outcome of the client engagement (estate planning completed or client declined to complete the process).

- A feedback survey can be sent to the participating attorneys and the students. Some programs may also wish to ask clients to complete a survey. However, if a survey is to be sent to clients, consent should be documented prior to the client's participation in the program.

Spring Semester

- Email attorneys. Connecting with attorneys each semester can maintain their involvement. By seeking their participation each semester, each attorney is able to participate based upon their availability rather than being expected to be available each semester.

- Email students. Even though the majority of students will complete their training and establish participation during the first semester, the second semester is an excellent opportunity to draw in more participants.
- If the Estate Planning Fellow and Supervising Professor are able, it will be helpful to hold additional training sessions in the second semester. Doing so will allow students who were unable to attend the trainings in the previous semester to participate in the program.

End of Academic Year

- Before the end of the academic year, the Supervising Professor will recruit and appoint the next Estate Planning Fellow. It can be useful for the incoming Fellow to meet with the outgoing Fellow to discuss challenges and best practices for the role.

- At the end of each academic year, the Estate Planning Fellow and Supervising Professor should prepare a report for the law school, donors, volunteer attorneys, and participating students. The report can include the following: clients served, pro-bono hours recorded, students involved, types of documents prepared, and recommendations for the future. Recommendations can be the result of collaboration between the Fellow and the Supervising Professor, as well as suggestions made through surveys and feedback.

- The Supervising Professor should send thank you notes to the participating attorneys and referral sources.

Summer Semester

The summer can be used to serve additional clients, if attorney-student pairs are available. Although many students will be unavailable during the summer months, summer clients can be particularly beneficial to students who wish to build their resumes while taking summer courses. A challenge is that the Estate Planning Fellow will likely be a graduating student who will not be available during the summer. It may be possible to start the fellowship for the following academic year in the summer, but applicants for the fellowship may not be available during the summer. Without the Estate Planning Fellow, the Supervising Professor will be responsible for maintaining records and corresponding with clients, attorneys, and students.

Fundraising/Support for Estate Planning Fellow

The Estate Planning Fellow plays a critical role in the program, so the law school may want to begin fundraising the year before it starts the program. If the school is able to provide administrative assistance for the first year or two, the school would then be able to demonstrate the success of the program to potential donors. Local lawyers and alumni may be interested in funding the fellowship, and a school might ask a local law firm to support the fellowship each year in exchange for naming the fellowship for the firm. The amount needed to fund the fellowship is relatively small, making support for the program appealing to potential donors. A stipend of $5,000 means a lot to a law student, but that amount is modest in terms of fundraising.

Wills for the Underserved Program

This program provides people in underserved populations with pro bono estate planning assistance that includes wills, advance directives, and durable powers of attorney. A volunteer attorney works with a trained law student during the process of interviewing the client and drafting the documents. Law students gain an understanding of the practical work of estate planning, and the lawyers offer valuable insights while providing the oversight necessary to protect the clients. This program creates mentorship opportunities, which benefit both the mentor-attorney and the law student, and it exposes students to the benefits of working with the underserved.

The program is designed to recruit and retain the best and brightest students by providing the opportunity to partner with a faculty member and practicing attorneys on a substantive project.

The Estate Planning Fellow

The Fellow works directly with Professor Susan Gary to administer the program, and is responsible for onboarding qualified students, arranging client referrals with Legal Aid and other sources, managing student- lawyer pairings, record-keeping, and pro bono reporting. The Fellow has the opportunity to network with participating attorneys recruited by Professor Gary and participate in the Program with the other students.

All students in the program will receive extra training in estate planning, beyond their coursework. Students are

eager for hands-on experience, and initial indications of interest are strong. Each student will work directly with a volunteer lawyer to provide pro bono services to a client.

The annual operating budget for the Estate Planning Fellow and the Wills for the Underserved Program is $5,000.

Clients

The program is available to low-income individuals screened by local nonprofit law firms or legal aid offices, veterans, or first responders (firefighters and police officers).

Services Provided to the Client

- The lawyer-student team drafts a non-tax planning Will.
- The team reviews all beneficiary designations and other non-probate transfers. The team coordinates all documents involved in the estate plan.
- The team may also prepare a durable power of attorney and an advance directive.
- A lawyer may agree to provide services beyond the basic documents (either pro bono or for a fee) but is not be expected to do so. For example, the expectation is that the teams will not draft revocable trusts, but a lawyer may agree to do so for a particular client.

Program Outcomes

Goals for the Wills for the Underserved Program include:

- Provide estate planning services for underserved populations.
- Introduce law students to estate planning and train them in interviewing and drafting skills.
- Provide an opportunity for law students and attorneys to network as well as foster mentorship relationships.

All students in the Program receive extra training in estate planning, beyond their coursework. Each student works directly with a volunteer lawyer to provide pro bono services to a client.

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[Email to lawyers]

Estate Planning Pro Bono Project – Wills for the Underserved

[Name of law school] has created a pro bono mentorship project called “Wills for the Underserved.” The general idea for the program is that a lawyer and a student work together to provide basic estate planning services to a client.

The services offered through the program are the preparation of a non-tax planning Will, perhaps with a trust for minor children, and, depending on the client’s wishes and needs, a durable power of attorney and an advance directive. In addition, the student-lawyer team will review and discuss with the client all beneficiary designations and other non-probate transfers. The team might recommend that a client seek legal assistance elsewhere for additional services, or the supervising lawyer could agree to do additional work for a fee.

To qualify for this project, each student must participate in trainings using three high-quality videos on basic estate planning topics and additional discussion. The training includes comments about local practice and time for questions.

The success of this project depends on the willingness of local lawyers to participate on a pro bono basis. Each lawyer agrees to work with one student and one client. It would be wonderful if a lawyer could work with a student and a client each semester (fall, spring, and possibly summer), but participation can vary depending on each lawyer’s availability, and an initial commitment is just a commitment to one client.

We have been able to raise money to create the position of Estate Planning Fellow. The Fellow, a law student, manages the pairing of lawyers and students and the client referrals. Our clients come from **[names of referral sources].**

After a client is assigned, each student-lawyer team will meet with its client, and then the student, under the supervision of the lawyer, will draft the proposed documents. The lawyer will review the documents, the student will make any needed revisions, and the lawyer and student will meet with the client to explain and execute the documents. We are assuming that each lawyer will want to use the lawyer’s own forms.

I would love to have your participation in this project, either now or next year. I will create a pool of lawyer-volunteers, and you can let me know about your availability in a particular semester. If you are interested in participating, please email me at **[contact information for professor or other person managing the program].**

Dear Students,

Welcome back to the Law School!

[Name of law school] has a pro bono program to provide wills for underserved populations such as **[describe referral sources**, e.g., veterans identified by a nonprofit law firm, low-income/low-asset clients identified by legal aid, or clients identified through our domestic violence clinic]. Any 2L or 3L student who has completed Trusts and Estates is eligible to participate in the program. If you are currently enrolled in Trusts and Estates and want to participate next semester, you can go ahead and get the training this semester so that you are ready to go at the beginning of next semester. Students who participate in the program will be mentored by local estate planning lawyers.

Each participating student must watch two hour-long videos plus part of a third video and then attend two one-hour trainings. These trainings will likely be held over the lunch break early in the semester. **Prof. _______** and a local lawyer will lead the trainings. **[describe the required trainings in this paragraph]**

After the trainings are completed, each student will be paired with a local lawyer. The student and lawyer agree to work with one client. Depending on the number of clients and the number of lawyers willing to participate, a student may be able to participate in more than one semester.

Each student-lawyer team will meet with the client, and then the student, under the supervision of the lawyer, will draft the proposed documents. The lawyer will review the documents, the student will make any needed revisions, and the lawyer and student will meet with the client to explain and execute the documents.

The services offered will be the preparation of a non-tax planning will, a durable power of attorney, and an advance directive. In addition, the student/lawyer team will review and discuss with the client all beneficiary designations and other non-probate transfers.

If you are interested in participating in this program this semester, please email Estate Planning Fellow **[insert name]** at **[insert email address** – ideally an address would be created for the EP Fellow separate from the person address and the EP Fellow address can then be used each year by the new Fellow]. You can also email **[name of Fellow]** with questions about the program before deciding whether to participate. The time commitment is not extensive, but the rewards – working with a local lawyer, helping a client who otherwise wouldn't have a will, earning pro bono hours, and learning more about wills and estate planning – are great!

[Letter to Potential Client Referral Source]

Dear _________,

My name is **_________** and I am a professor at **[name of law school]**. I am contacting you to discuss our Wills for the Underserved program and the possibility of our providing legal services to people served by **[name of organization].**

Wills for the Underserved is a relatively new program at the Law School. The program works with volunteer attorneys and law students to provide underserved populations in our community with basic estate planning services, including wills, advance directives, and powers of attorney. These services are offered free of charge to clients of the program, and our goal is to reach clients who cannot afford legal fees for this work.

Law students who participate in the program go through extra training, after their basic course work, to prepare them for this work. They are then paired with local estate planning lawyers who volunteer to mentor the law students and work on a pro bono basis with the clients. Each attorney-student team works with one client (or one couple – partners or spouses would be served together unless the lawyer found any conflicts that precluded joint representation).

As we develop our program, we need to partner with local organizations who can help us identify clients for the program. I know of the good work your program does, and it occurred to me that the clients you serve might be appropriate clients for our program. Basic estate planning is important for everyone, but people with limited financial resources are unlikely to be able to hire a lawyer to help with that work.

I would like to talk with you about our program, answer questions you may have and see whether we might develop a pipeline for clients. We cannot serve large numbers of clients, unfortunately, but at least the clients we are able to serve will get assistance that will benefit them.

I thought I would send this information first, and then perhaps we could arrange to talk by phone. I hope we can schedule some time to talk.

With best regards,

Estate Planning Services
[Name of School]

Through a program created by the **[name of school],** you may be able to get help with basic estate planning services for free. Local lawyers and law students volunteer their time to make this program possible, serving on a "pro bono" basis. The program is limited in the number of people we can serve, but we encourage you to contact us if you think you could benefit from these services.

This program is designed to make basic estate planning services available to people in our community who could not otherwise afford those services. Although we cannot serve everyone who might benefit from this program, we will do our best to serve as many people as possible.

If you qualify, you will meet with an experienced lawyer and a law student with specific estate planning training. This team will meet with you to discuss what you need to achieve your goals regarding your property and decisions about your medical care throughout your life.

After gathering your information and discussing a proposed plan with you, the lawyer-student team will prepare any of the following documents that you would like to have and that the team would recommend:

- A Will
  - Allows you to choose how to distribute your property after death
  - Allows you to name a guardian for any minor children
  - Provides a way to manage property for minor children until they become adults

- A Power of Attorney
  - Allows you to decide who can make decisions about your property if you no longer can, or in case you reach a point where you no longer can

- An Advance Directive
  - Allows you to name someone to make your health care decisions if, and when, you are unable to make them and provides guidance to medical personnel about your wishes

Once your documents are drafted, the lawyer-student team will meet with you again to make sure the documents read as you want. If you are satisfied with the documents, the lawyer-student team will help you sign them so that they are legally binding.

If you are interested in participating in this program, please send an email to **[email address for Estate Planning Fellow]** with your name and contact information (email or phone).

LOGO

Wills for the Underserved

Pro Bono Opportunity!

Partner with a local attorney to prepare a will and other estate planning documents for clients served by this program.

Eligibility:	a 2L or 3L who has taken, or is currently taking, Trusts and Estates
Training:	Participants must attend two one-hour long training sessions held on:
Questions:	Contact [email]

[email to attorney who has agreed to participate]

Dear ______________,

Thank you for taking part in the Wills for the Underserved program! This program is designed to offer law students the opportunity to develop estate planning skills as well as build relationships with practicing attorneys in the area. We hope this will be a positive experience for all involved. You have been paired with:

Student
Phone
Email

[Name of student] is a [2L or 3L] who has completed several hours of training. Though the timeline will depend on your availability, the steps below are required in order for the student to complete this program.

1. **Contact the client.** The student will make initial contact with the client in order to gain background information and availability.
2. **Attorney/Student meeting.** We recommend an initial meeting of 30-60 minutes before the meeting with the client. The attorney can explain the process that will be followed with the client, and the student can be made familiar with necessary forms and given an opportunity to ask questions.
3. **Client meeting.** The client meeting will typically take place at the attorney's location. If you wish, we may be able to arrange for the use of a conference room at the law school. Most attorneys will take the lead during the client meeting. It will be instructive for the student to observe the interview process, and the student may not have had specific training in interviewing skills. If you prefer, the student can direct the dialogue. In either case, please discuss the interview process during the attorney-student meeting.
4. **Draft documents.** After the initial meeting, if no further information is required, the student will draft the requested documents and send them to you for feedback. After making any requested revisions, the student will coordinate the delivery of the documents to the client.
5. **Witness signing**. After the estate planning documents have been approved by the client, the student will schedule a time for the will execution to take place.

This program plays an important role in the community and it is our desire to see it grow in the years to come. Our success is dependent upon your willingness to volunteer your time and expertise. For the role you play in the lives of both clients and students, thank you. If you have any questions along the way, please feel free to contact me or Professor ____________.

Best,
[name of Fellow]
Estate Planning Fellow

[email to student after completion of training]

Dear ____________,

Congratulations on completing the necessary training to participate in the Wills for the Underserved program! This program is designed to offer you the opportunity to develop estate planning skills as well as build a relationship with a practicing attorney in the area. We hope this will be a positive experience for all involved.

Attached to this letter please find the Student Assignment sheet, complete with contact information for your designated attorney. You will receive client information from me as soon as a client is available. It is your responsibility to correspond with the attorney and to facilitate communication with the client. Please note the following steps that must be taken in order to complete your participation in this program:

1. **Contact the client.** It is important to introduce yourself to the client and explain that you will be working with a practicing attorney to assist them with their estate planning needs. If applicable, provide them with the name of the referring attorney or organization. During this communication, you should gather additional contact information, ascertain requested planning services, and note the days and times the client will be available to meet in the coming weeks. This should be done as quickly as possible and no more than two days after receiving the client information.
2. **Contact the attorney.** Once you have gathered information from the client, introduce yourself to the attorney and set up a time to meet, at their convenience. The first meeting should be 30-60 minutes and will provide you with exposure to the attorney's forms, preferences, and also give you a chance to ask questions. An attorney may want to schedule this meeting immediately prior to the client meeting.
3. **Schedule the client meeting.** If availability has already been discussed with the attorney and the client, set up a time that meets the requirements. Let the client know the location for the meeting, with directions and information about parking if appropriate.
4. **Client meeting.** The client meeting will typically take place at the attorney's office. If the attorney with whom you work asks to use a conference room at the law school, please advise the Estate Planning Fellow immediately. During the client meeting, you will gather information necessary to draft the documents requested. Most attorneys will take the lead during the client meeting, and this will give you the opportunity to observe the interview process. The attorney will discuss the interview process with you beforehand and will indicate whether the attorney wants you to take the lead in the interview.
5. **Draft documents.** After the initial meeting, you will draft the requested documents and send them to the attorney for feedback. After making requested revisions, you are responsible to coordinate the delivery of the documents. Some attorneys may wish to have you print and mail the documents yourself while others will have a process they will prefer to follow.
6. **Witness signing**. After the estate planning documents have been approved by the client, you will schedule a time for the will execution to take place. If for any reason this cannot be arranged, please note the reason when you return your Student Assignment sheet.

This program plays an important role in the community and it is our desire to see it grow in the years to come. Part of that is dependent upon your participation at this time. You have the opportunity to represent the law school and to establish a firm foundation for future participants. If you have any questions along the way, please feel free to contact me or Professor ________.

Best,

[name of Fellow]
Estate Planning Fellow
University of Oregon School of Law

Wills for the Underserved: Student Assignment Information

ASSIGNMENT INFORMATION

Student Name: ______________________ **Mentor Attorney:** ______________________

Participation Semester: ______________________ **Assigned Client:** ______________________

CONTACT INFORMATION

Student email: ______________________ **Attorney email:** ______________________

Student phone: ______________________ **Attorney phone:** ______________________

TRAINING: This section must be signed after each program requirement is completed (orientation/training hours)

Videos Completed (Student Signature): ______________________ ______________________

Training 1 Completed (Student Signature): ______________________ **Training 2 Completed (Student Signature):** ______________________

PROGRAM REQUIREMENTS: Please check off each requirement as it is completed

It is the student’s responsibility to complete the following steps as part of participation in this program:

☐ Call to Client ☐ Attorney Meeting ☐ Client Intake Meeting ☐ Will Drafting and Approval ☐ Will Signing

Dates:

_____________ _____________ ________________ ___________________ ____________

If a will was drafted and approved by the supervising attorney but the student did not witness or is unaware of whether or not the will has been signed, please explain:

PROGRAM DOCUMENTS

Participating student has received:

☐ Client information sheet (this document - to be returned to the Estate Planning Fellow or program supervisor after completion of project)

RETURNED DOCUMENTS

Participating student has returned:

☐ Client information sheet) ☐ Pro bono hours record (hours can be indicated on this client information sheet)

Pro bono hours related to this client: _________________

Wills for the Underserved Students with Trainings Completed – [year]

3Ls	Contact Information/Notes

2Ls	Contact Information/Notes

Interested/Training Incomplete	Contact Information/Notes

Estate Planning Fellowship

The Law School is accepting applications for a fellowship for a 2L or 3L student. The Estate Planning Fellow will work with Prof. ____________ on a project called Wills for the Underserved. This project involves linking students with local estate planning lawyers to provide legal services on a pro bono basis to low-income clients. The Fellow's responsibilities will include administrative work, preparation of educational materials, and the provision of services to two clients, under the supervision of a local lawyer.

The Estate Planning Fellow's duties will include:

- Recruiting law students to participate in the program (Prof. ______ will recruit lawyers)
- Assisting with the required trainings for students who participate in the program (videos and written materials are provided by the ABA-RPTE)
- Working with local sources (Legal Aid, other local organizations) to obtain clients
- Coordinating the pairing of lawyer-student teams with clients
- Maintaining records
- Assisting lawyers and students with reporting pro bono hours
- Collecting feedback from students, lawyers, and clients

Applicants interested in being considered for the fellowship should submit the following:

1. A cover letter explaining the applicant's interest in estate planning work and any relevant course work taken. Preference will be given to applicants who have taken Trusts and Estates and who participated in the Wills for the Underserved program last yar.

2. A current resume.

Applications can be submitted by email or in hard copy, in either case to __________. Applications must be received no later than _________ at 5:00pm to be considered.

The fellowship appointment is for one academic year. The stipend accompanying the fellowship will be in the amount of _____-