SMU Dedman School of Law

Plan Your Own Path

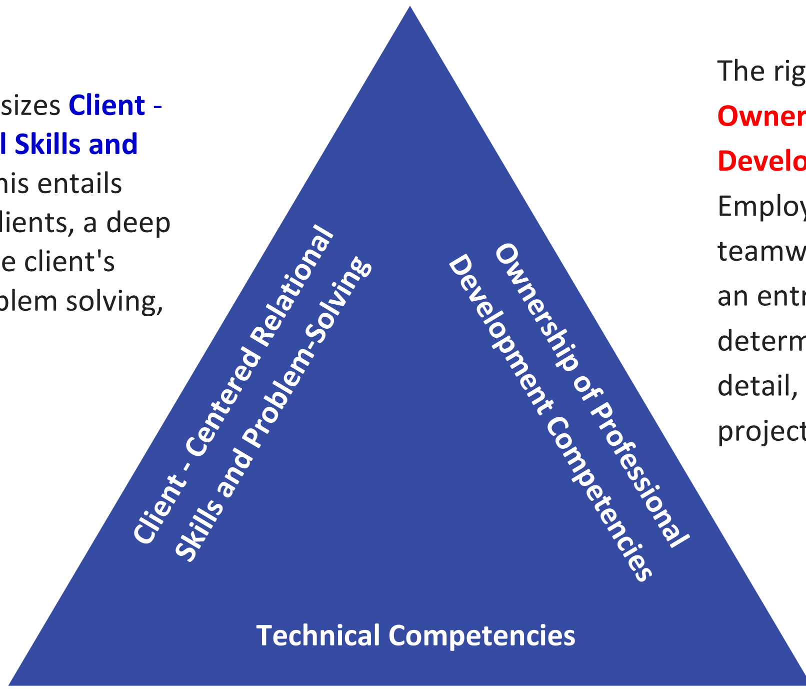
ESTATE PLANNING

OVERVIEW

Estate planning specialists work with individuals and families and help them to make decisions about the distribution and use of their wealth and to create the legal framework that makes those plans a reality. The estate planner therefore needs information about the law applicable to trusts and estates as well as a firm understanding of taxation. Lawyers in this area also need good drafting and client counseling skills.

This handout helps you plan your path to an estate planning law career, covering essential competencies for clients and legal employers. As you plan, ensure you incorporate all three sides of this triangle.[1]

The left side emphasizes **Client - Centered Relational Skills and Problem-Solving.** This entails responsiveness to clients, a deep understanding of the client's needs, creative problem solving, and client-centered communication.



The right side centers on **Ownership of Professional Development Competencies**. Employers and clients require teamwork, a strong work ethic, an entrepreneurial mindset, determination, attention to detail, integrity, and effective project management skills.

The base comprises fundamental **Technical Competencies**, including knowledge of the law, legal analysis, legal research, communication in the legal context, and legal judgment.

[1] *See* Neil W. Hamilton, *The Gap Between the Foundational Competencies Clients and Legal Employers Need and the Learning Outcomes Law Schools Are Adopting*, 89 UMKC L. Rev. 559 (2021).

This guide is arranged by the three crucial sides of the triangle.

TRADITIONAL TECHNICAL COMPETENCIES

Enroll in foundational courses during your first and second year, such as:

- Property I & II
- Trusts & Estates
- Income Tax
- Estate, Gift & Income Tax

Related Courses: Estate planning lawyers work within a highly varied legal environment that places a premium on a broad knowledge base beyond substantive estate planning law. Of particular relevance to an estate planning practitioner are the courses listed below:

- Estate Planning & Practice
- Corporate Tax
- Partnership Tax
- Business Enterprise
- Employee Benefits & ERISA Litigation
- Family Law
- Law Practice Management
- Oil & Gas
- Texas Matrimonial Property (if planning to practice in Texas)

Upper-Level Writing Requirements: In your third year, choose an estate planning law-related Edited Writing course or Directed Research paper topic (with faculty pre-approval) to improve and showcase your research, writing, and analytical competencies.

CLIENT-CENTERED RELATIONAL SKILLS AND PROBLEM SOLVING

Thoughtfully evaluate experiential opportunities. These are excellent ways for you to cultivate superior client focus, innovative problem-solving, and effective communication skills.

- **Externships**:

- **Clinics**:

Be sure to work closely with your Office of Career Services advisors to obtain additional experiences (internships, judicial clerkships, public service opportunities) to grow your knowledge and skills in this area.

OWNERSHIP OF PROFESSIONAL DEVELOPMENT COMPETENCIES

Experiences beyond the formal curriculum are vital to your professional growth. Aim to acquire experiences that closely replicate as much as possible the work lawyers engage in within the estate planning law space.

- **Student Organizations:** Commit yourself to relevant, on-campus organizations and actively pursue leadership, project management, and teamwork opportunities within the organization.

- **Public Service Opportunities:** These pre-approved placements at 501(c)(3) organizations and government offices may provide you additional perspectives that are valuable to your career development
    - Legal Hospice of Texas
    - Advocates for Community Transformation Wills Project

- **Law Journals:**
    - Author a note or comment on an estate planning law topic and seek to have it published in one of our journals or elsewhere

- **Dallas Bar Association Sections:** Explore your interests and immerse yourself in the legal profession by becoming part of these Dallas Bar Association sections.
    - Probate, Trusts & Estates Law Section
    - Real Property Law Section
    - Tax Law Section

Faculty: Start building a connection with a professor who is familiar with your work and can write you a letter of recommendation or serve as a reference. Here are some of the full-time faculty members who teach in this field.

Josh Tate
Joanna Grossman
Christopher Hanna (taxation)
Orly Mazur (taxation)

Cultivate Your Personal Network: Reach out to corporate attorneys to arrange informational interviews through the Mustang Exchange or connections you establish during your law school journey. You should also ask your Career Services advisor to help you identify graduates and law firms in this space in the location(s) where you want to work.

Full-time and adjunct professors who teach estate planning law courses may have strong networks. Ask them for assistance making these connections.

Attend programs featuring estate planning law attorneys sponsored by the Office of Career Services or student organizations. These kinds of programs are great opportunities to learn more about entry-level careers and to connect with speakers who are often alumni and more willing to assist you.