Change is the law of life. And those who look only to the past or present are certain to miss the future.

John F. Kennedy
KENTUCKY ESTATE PLANNING PRACTICE MATERIALS
Shannon Kemen

This guide examines some of the best print and electronic resources available for a Kentucky estate planning practice. Part I: Print Resources, contains general descriptions, finding aids, call numbers, publisher information, and research tips for each print publication listed. Part II: Electronic Resources, includes directions on how to access Kentucky estate planning practice materials using Westlaw and Lexis.

I. Print Resources

Baldwin’s Kentucky Lawyer’s Handbook with Forms (West)

This handbook contains practical information, expert analysis, and authoritative commentary on probate practice. Comprised of three softbound volumes which are replaced annually, the handbook also includes practice forms, references to Kentucky primary law and secondary sources, a Table of Laws & Rules, a Table of Cases and an Alphabetical Index. One of the most notable features of the handbook is found in Appendix A, which includes a timetable for statutory proceedings in rule number and alphabetical order to help you keep track of important deadlines.

Baldwin’s Kentucky Wills and Trusts (West)
Call Number KFK1344.H86

This single volume guide can be used to help prepare estate plans, minimize estate and inheritance taxes, and draft wills, trusts, and other instruments. Updated by pocket parts, it also includes planning pointers, cautions and examples for practitioners, references to Kentucky primary law and secondary sources, a Table of Abbreviations, a Table of Laws & Rules, a Table of Cases and an Alphabetical Index.

The forms available in the guide are also annotated and cross-referenced to the text of the book and include illustrations of situations that would prompt their usage. The guide also has three appendices that will be of interest to the user: Appendix A, which includes selected Kentucky Revised Statutes Provisions; Appendix B, which includes Kentucky Revenue Cabinet Policies; and Appendix C, which includes Kentucky Revenue Cabinet Circulars.

Caldwell’s Kentucky Form Book (Lexis)
Call Number KFK1268.C3 2006, Volume 3, Unit 10: Estate Planning

Prepared in conjunction with UK/CLE, the Fifth Edition of this loose-leaf publication has been completely re-written and re-organized. It provides nearly 2,000 official AOC and author-drafted forms as well as court forms, practice context and practice resources for various legal topics, including wills, trusts, probate procedures, executors and administrators and escheat. In addition to the text of the forms themselves, the body of each form is followed by references to statutes, case law, public records, treaties and practice guides associated with the form.

Kentucky Practice - Probate Practice & Procedure (West)
Call Number KFK1280.K4 v. 1-2 1984, Volumes 1&2

Prepared by an expert in the field, this set combines a treatise on substantive law with a practice manual. It covers recent legislative developments, analysis of new case law, forms, and rules, and provides references to Kentucky primary law and secondary sources. Updated by pocket parts, this set also includes a Table of Statutes in Volume 2 and an Alphabetical Index.

Kentucky Probate (Lexis)

This three part loose-leaf manual provides an overview of Kentucky probate practice and includes a data packet for recording vital client information, a procedures section that sets out the steps to complete the ad-
ministration of a decedent's estate, sample letters and forms. It also includes a Table of Statutes, a Digest of Decisions and an Alphabetic Index. Part III of the set will be of particular interest for practitioners since it contains the data packet, the rules of probate practice for Fayette and Jefferson Counties, a primer on trusts, a chapter on the needs of the elderly, probate practice forms and State and Federal Tax Forms.

UK/CLE Annual Midwest-Midsouth Estate Planning Institute (Lexis)
Call Number KFK1340 .A75 A56

This annual CLE is offered by the University of Kentucky's Office of Continuing Legal Education. It covers notable developments in estate planning, issues related to tax, family and elder law, estate planning, case law and legislative updates, fiduciary litigation updates and many other topics. The speaker-prepared course materials provide a valuable source of information on the current state of Kentucky estate planning. To access these materials locally visit the Salmon P. Chase College of Law Library. The Chase Law Library has materials from the Estate Planning Institute dating from the 18th Institute (1991) to the 37th Institute (2010), as well as materials for several other UK CLE titles.

II. Electronic Resources

Lexis
To locate Kentucky estate planning practice materials on Lexis:
1. From the Legal Tab, Select States Legal – U.S.
2. Select Kentucky
3. Select Search Analysis & CLE Materials
4. Select Estate Planning & Probate

The main Kentucky estate planning practice materials available through Lexis are: Kentucky Estate Administration (UKCLE), Kentucky Intestacy Law (UKCLE), Kentucky Probate, and Modern Estate Planning (See Chapter 70 State Death & Gift Taxes, Kentucky §70.22[1]-[16] and Chapter 71 State Fiduciary Income Tax, Kentucky §71.21[1]-[7]).

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