



# Thomas M. Cooley Law Libraries' Research Guide Series

## Useful Resources for the Estate Planning Classes

### Books and Online help for the Estate Planning students

This bibliography includes print and online materials that will help you during the term. Many of the printed books are also available on Westlaw and Lexis. The forms for most of the ICLE books are available as well. The annotations include call numbers and also indicate if they are on Westlaw or Lexis.

If the book contains a CD, you will see "**CD/FORMS PC**" at the end of the annotation. These CDs can be checked out at the Circulation desks at the Auburn Hills and Grand Rapids libraries, and are found on the FORMS PC in Lansing.

### How to download Westlaw models that you found in Books

It is often easier to find information in a book than online with Westlaw and Lexis. After you find a good model Will or Trust in a book, and that book is available on Westlaw or Lexis, it is a simple matter to retrieve the full text of that document. Here's how.

- 1) **Note the form number from the book.** For example, using the title Michigan Legal Forms, you discover that 4:127 is the form number. The annotation in this bibliography indicates that the Westlaw database name is: **MI-LF**.
- 2) In Westlaw on the left side of the screen where it says "Search these databases," **type the Westlaw abbreviation** (for our current example, type **MI-LF**) and click GO.
- 3) When the search page opens, **type the form number** (for this example, type 4:127) and click Search. Two or three items should appear in the results list, with one of them being your desired form.
- 4) Now you can **cut and paste**, or save the document to your word processor and then edit it. (You would of course edit it).

### How to download Lexis Models that you found in Books

**Suppose that you were browsing Murphy's Will Clauses**, and found: Form 5.05[9][a]-5 Outright Devise of Residuary to Two Children. With Lexis it is often easier to search words than numbers, so we would find the online version of Murphy's and they search "Outright Devise of Residuary to Two Children"

- 1) Locate the Lexis Database. From the Lexis main search page (not the student start page), click the grey tab "**Find a Source.**" **Type "Murphy's" into the search window** and click FIND (If you forget the apostrophe, it won't work).



2) You will get about 9 hits, but they are all pointing to the same online book. **Click one of the hyperlinks.**

3) **The Table of Contents search page should come up.** Now scroll down to chapter 5 (because our example citation is 5.05[9][a]-5 ) Now you can either click the PLUS icon to expand the tree until you find your set of interrogatories; or better yet, you can HOVER your mouse over the plus sign and you will then have the option to expand the tree for chapter 5 fully or only partially.

Sometimes you will find that it is easier to use the SEARCH window and search the Lexis table of contents rather than browse it. It depends on which database you are searching.

## Accessing FORMS on CD

Many books, including those published by ICLE (Institute of Continuing Legal Education) often come with a disk or CD that includes all the models/forms contained in that volume Lansing, these disks and CDs are uploaded onto the "Forms PC," a computer adjacent to the Reference Desk in the Strosacker room of the library. In Grand Rapids and at Auburn Hills – non ICLE books have the CDs shelved with the books. ICLE CD's may be checked out at the Circulation Desk.

To access these forms, you generally load the CD a computer, and then find the form that you had already located in the printed book. It is usually easier to find the form in the book rather than to just browse the CD.

In Lansing the CDs have all been put on a computer called the FORMS PC. For access these FORMS in Lansing:

- 1) Locate the form in the book and note the call number of the book and the form number (or just bring the book over to the Forms PC).
- 2) The forms are stored in sub directories based on the call number of the book. Click on the sub directory that matches the call number of your book. Once you locate your form, you can download it to your 3.5 inch disk (please bring one with you). Or you can print the form. Please do not edit the form while at the Form's PC.

In Grand Rapids and at Auburn Hills the PCs in the labs will play the CDs or you can play them on your own laptop.

## Browsing the Westlaw and Lexis Tables of Contents

Many of the books that are available on Westlaw and Lexis include tables of contents. It is sometimes convenient to just browse these tables of contents rather than to start with the print version of the book.

In Westlaw, once you bring up the database, there may be a **hyperlink above the search window that says "Table of Contents."** If so, then searching the database (i.e. online book) will



be easier. Not all of the databases have tables of contents. Remember that the database abbreviation is included in the attached annotations. Just type that abbreviation in the "Search these databases" window on the left side of the Westlaw screen, and click GO. Then if there is a Table of Contents link, just click on it.

With Lexis, most of your options are set such that if there is a table of contents, then it will appear as soon as you have selected your database. If your options have changed, then you may see a standard Lexis search screen, but there will be a hyperlink next to the Search button that says "Browse TOC." Click that and you can browse the Lexis table of contents. Some of the Lexis Tables of Contents have many sub levels of expanding trees. These can be difficult to browse. However, by hovering your mouse over the "+" sign next to the branch of the table of contents tree you wish to expand, a small window will open that will let you fully expand whatever branch you are looking at.

## STATE SPECIFIC FORM BOOKS AND TREATISES

(While the following titles are Michigan specific, every state will have similar items.)

For Michigan specific form books, there is only one source on Westlaw or Lexis. Many of the print items, however, come with disks. The library has made those disks available on the FORMS PC adjacent to the Reference Desk. To find forms on the FORMS PC, it is generally best to locate a sample Will or Trust in one of the books that includes a disk, and then find that form on the FORMS PC.

### Michigan Legal Forms

KFM 4268 .M53 (AH, GR-1<sup>st</sup> floor & LAN-Michigan Collections)

This 11-volume loose-leaf set of books is Michigan best source of non-litigation forms. Each legal topic starts with a discussion of legal drafting principles for that topic, as well as numerous checklists and forms. One volume is devoted entirely to estate planning, providing 200 pages of sample Michigan wills and will clauses, as well as 200 pages of trusts and trust clauses. There is an index at the end of each volume as well as one for the entire set. There is also an excellent table of contents at the beginnings of both the wills and the trusts chapters.

To search this title online, you can either browse the table of contents, or run a simple search.

**Example:** Suggest running a simple search to the title field. For example, to search for clauses involving "pour over," run "pour over" as a phrase (i.e. putting it in quote marks) and restrict it to the TITLE field: **TI("pour over")** (You could also have typed **pour-over** with a hyphen rather than using quote marks). Westlaw: **MI-LF**

### Lexis Forms: Midwest Transaction Guide - Estate & Probate Law & Forms

Online with Lexis only

This title includes model wills, trusts and clauses for Indiana, Illinois and Michigan. There is no indication what state the samples wills and clauses are for however. There is an online Table of Contents with an expanding tree that makes this online resource extremely easy to use. Hover your mouse over the branch of the table of contents tree in order to expand a branch fully with one click. You can also search either the table of contents, or the full text depending on the option button checked under the search window.



**Example:** Here is an example search. Find the word "pour-over." Select the option to run the search in the table of contents, and then type: "**pour over**" as a phrase (i.e. with quote marks) in the search window and click search. You could also leave out the quote marks and type **pour-over** with a hyphen. And because Lexis treats two words together as a phrase (unlike Westlaw), you could also type: **pour over** as your search.

### Lexis Forms: Midwest Transaction Guide

#### Planning for Estates and Administration in Michigan [Known as Hoops]

KFM 4340 .H66 1983 (AH, GR-1st floor & LAN-Michigan Collections)

This is a five volume treatise that is updated annually with pocket parts and loose leaves. There are sample wills, trusts and other estate planning documents. The title also includes estate planning checklists.

#### Michigan Estate Planning Handbook

KFM4340 .M53 (AH, GR-1<sup>st</sup> floor & LAN-Reserved Readings Collection)

This is an Institute of Continuing Legal Education (ICLE) title. The title is both a treatise and a forms book. Each chapter is written by a different expert in the field. The chapters sometimes contain clauses within the text of the treatise; other times there are model clauses, wills and trust documents at the end of the chapters. **Forms PC (Lan), Reserve Desk (AH, GR)**

#### Michigan Estate Planning, Will Drafting & Estate Administration

KFM 4340 .A65 L69 (LAN-Reserved Readings Collection)

This is a two volume treatise and form book that is updated annually with pocket parts. The title contains treatise materials, as well as model wills, trusts, clauses, letters and even attorney client agreements. This title addresses tax issues, powers of attorney, and the administration of a decedent's estate.

#### Michigan Revocable Grantor Trusts

KFM 4339 .L57 M52 (AH, GR-1<sup>st</sup> floor & LAN-Reserved Readings)

This one volume title is an Institute of Continuing Legal Education (ICLE) publication. The title is primarily a treatise, but does include several model forms.

**Forms PC (Lan), Reserve Desk (AH, GR)**

#### Estate Planning Forms

KFM 4340 .A65 E854 (LAN-Reserved Readings Collection)

This title is basically an in-house form book used by the estate planning division of Comerica Bank.

**Forms PC**

## NATIONAL FORM BOOKS

#### Am Jur Legal Forms 2d

KF 170 .A542 (AH, GR-1<sup>st</sup> floor & LAN-Lower Level)

This is a 60-volume set of model forms and clauses. There are three volumes that include materials on trusts, and two volumes on wills. At the beginnings of the wills and the trusts sections are tables of contents. There is a master set of indexes at the end of the set, and indexes at the ends of most of the volumes. **Example:** Here is an example search for forms and clauses involving a title field search for "pour-over." Bring up the AMJUR-LF database, and in the search window type: **TI(pour-over)** Westlaw: **AMJUR-LF**



## **Current Legal Forms, with Tax Analysis** [also known as **Rabkin and Johnson**]

KF 170 .R3 (AH & LAN-Lower Level)

This is 35-volume multi-topic treatise and form book. The treatise materials for each topic provide tax analysis, actual practice analysis, and drafting guidelines. This drafting guidelines section contains model clauses with a parallel column offering explanatory notes. Finally there is a large section at the end of each chapter filled with model forms. **Example:** To search online, bring up the Current Legal Forms database on Lexis, and find the word "pour-over." Select the option to run the search in the table of contents, and then type: **pour-over** and click SEARCH.  
Lexis: **Current Legal Forms**

## **Nichol's Cyclopeda of Legal Forms**

KF 170 .N5 (AH, GR-1<sup>st</sup> floor & LAN-Lower Level)

This is a 44-volume set of model forms and clauses. There are three volumes on trusts, and two on wills. There is a table of contents at the beginning of each legal topic. There is a set of indexes at the end of the set, but no indexes at the end of the individual volumes. These volumes are updated annually with pocket parts. Here is an example search for forms and clauses involving a title field search for "pour-over." **Example:** Bring up the NICHOLS-LF database, and in the search window type: **TI(pour-over)**.  
Westlaw: **NICHOLS-LF**

## **West's Legal Forms**

KF 1384 .A65 W47 (AH, GR Lower Level & LAN-Lower Level)

This is a popular 46-volume set of model forms and clauses that is found in many law offices. Volumes 16-18 cover estate planning. There are explanatory footnotes throughout. The title is updated annually by pocket parts. Here is an example search for forms and clauses involving a title field search for "pour-over."

**Example:** Bring up the WEST-LF database, and in the search window type: **TI(pour-over)**  
Westlaw: **WEST-LF**

## **TREATISES WITH FORMS**

### **Scott on Trusts**

KF730 .S3 1987 (AH, GR- Lower Level & LAN-Lower Level)

This 10-volume treatise is updated annually with a supplemental volume. It contains no forms but is a highly recommended title for estate planners.  
Lexis: **Scott on Trusts**

### **Trusts and Trustees** [Also known as **Bogert**]

KF 730 .B63 2000 (AH, GR-1<sup>st</sup> floor & LAN-Lower Level)

This title contains 23 volumes of treatise materials and two large volumes of model trusts and trust clauses. The forms volumes are indexed separately. ."

**Example:** Bring up the BOGERT database, and in the search window type: **TI(pour-over)**  
Westlaw: **BOGERT**

### **Murphy's Will Clauses**

KF 755 .A65 M8 (LAN-Lower Level)

This is a five volume Matthew Bender loose leaf that is updated annually. Each section contains about 1/3 treatise materials and 2/3 model forms and clauses. There is an index in the final volume. To search online, bring up Murphy's Will Clauses in Lexis. **Example:** find the word "pour-over." Select the option to run the search in the table of contents, and then type: **pour-over** and click SEARCH.  
Lexis: **Murphy's Will Clauses**



## **Page on Wills**

KF755.P3 (*GR- Lower Level & LAN-Lower Level*)

This title contains six volumes of treatise materials and one volume of forms. It is updated annually by pocket parts. To search online, bring up Page on Wills in Lexis. **Example:** find the word "pour-over." Select the option to run the search in the table of contents, and then type: **pour-over** and click SEARCH. Lexis: **Page on Wills**

## **Modern Estate Planning**

KF 6584 .M632 (*LAN-Second Floor*)

This five volume Matthew Bender loose leaf treatise is concerned primarily with the tax aspects of estate planning. There are, however, a large number of model forms and clauses in the last volume of the set. Lexis: **Modern Estate Planning**

## **Estate Planning Forms and Clauses** (*GR-Lower Level*)

Lexis' online description: "Anderson's Estate Planning Forms and Clauses presents a comprehensive compilation of forms and clauses encompassing not only wills and trusts but all aspects of estate planning, with special attention to tax considerations and consequences." To search online, bring up Estate Planning Forms & Clauses in Lexis. **Example:** Find the word "pour-over." Select the option to run the search in the table of contents, and then type: **pour-over** and click SEARCH.

Lexis: **Estate Planning Forms and Clauses**

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