**CANTEY & HANGER**
**ATTORNEYS AT LAW**
**2100 BURNETT PLAZA**
**801 CHERRY STREET**
**FORT WORTH, TEXAS 76102-6898**
**817/877-2800**

Wednesday, September 27, 2000

**NOEL C. ICE**
**ATTORNEY'S WEB SITE**
**WWW.TRUSTSANDESTATES.NET**

**BOARD CERTIFIED ESTATE PLANNING AND PROBATE LAW**
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**(817) 877-2885**
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**Teleice@earthlink.net**

**METRO LINE 429-3815**
**FAX 817/877-2807**
**TELEX 75-8631**

**FRONT DESK**
**(817) 877-2800**

**SECRETARY'S DIRECT DIAL**
**(817) 878-2944**

**Our File No.**
**STA60/84077**

Rhonda Brink
Law Offices of Rhonda Brink
3400 Northland Drive
Austin, Texas 78731
512/ 454-8400 (office)
512/ 454-2055 FAX

RE: 1999 Advanced Estate Planning Strategies Course—Implementing the Estate Plan

Dear Rhonda:

Enclosed are a series of draft documents that I promised to send you for possible use in your portion of the Advanced Strategies Course: Implementation. These documents are not part of the estate plan *per se*. Rather, they are used mainly for disclosure or for internal use. They include:

- Engagement Letter
- Approximate Fee Schedule
- Estate Planning Timetable
- Letter to Client Explaining Basic, Intermediate and Advanced Estate Planning and Asset Protection Techniques
- Letter to Client Proximate to Initial Estate Planning Meeting
- Internal Data Base Check Document
- Letter to Client Enclosing Instruments Listing In Table Form (1) The Documents We Are Preparing, (2) a Summary of the Terms of those Documents, (3) Our Understanding Of The Fiduciaries Appointed Under Those Documents, And (4) Background Information Identifying The Client And The Client's Family.

  - Identification of Client and Client's Family
  - List of Documents We Are Going to Prepare
  - Questions and Answers About Basic Terms of Specialized Estate Planning Documents
  - List of Fiduciaries
  - Lawyer's Notes Regarding Certain Modifications to Basic Estate Plan That Will Require Special Drafting

- Letter to Client Enclosing Original Estate Planning Documents (w/o signature pages)
- Exit Letter

* * * *

Crummey Trust Documents

- Notice to Adult Beneficiary of Withdrawal Rights
- Partition Agreement
- L to Client Enclosing Draft Of Insurance Trust
- Exit Letter Containing Detailed List of Procedures and Duties For Administering Crummey Trust

* * * *

- Memo to Client "What You Should Know About Your Family Limited Partnership"

These documents complement the documents I prepared for the 1998 Advanced Drafting Course. The documents that I made available for that course were the actual estate planning documents themselves, which required the client's signature. The enclosed documents are, for the most part, documents used to communicate the estate plan, confirm the accuracy of the information on which it is based, and to establish the scope of the attorney client relationship. I hope you are able to make use of them. Combined with the Advanced Drafting Documents, they comprise a complete estate plan, from a to z, from initial contact to completion.

Rhonda, if you read nothing else that is enclosed, read the exit letters, especially the Crummy Trust exit letter. I worked long and hard on these letters. It has long been my contention that Crummey Trusts are far more complicated than even most lawyers realize. The exit letter reflects that, by nailing down or at least addressing most of the issues that can reasonably be expected to arise in the administration and "implementation" of the trust.

For once, I am way ahead of schedule. I didn't know how to handle the pagination, so I will await further instructions from you in that regard and will re-print the enclosed drafts if necessary.

Yours very truly,

Noel C. Ice

ICE/ice

Enclosures: Enclosures are listed above.

cc: Sandy Keaton-Hardin w/o enclosures
State Bar of Texas
P. O. Box 12487
Austin, Texas 78711-2487
800/ 204-2222 X2043 (office)
512/ 463-1418 FAX