

Estate Planning Council Diversity Fellowship and Award



INTRODUCTION

After being inducted into the National Association of Estate Planners & Councils Hall of Fame, Alan Gassman vowed to do something to help diversify the estate planning world. Gassman joined the NAEPC's Diversity Committee. It is the mission of the National Association of Estate Planners & Councils (NAEPC) to promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the Accredited Estate Planner® (AEP®) designation and Estate Planning Law Specialist (EPLS) certification.

NAEPC believes that everyone, no matter their situation or economic status, can benefit from the experience and advice of a competent and ethical estate planning professional.

Gassman taught a summer course at Stetson University College of Law on Law Office Management and Professional Achievement. He felt compelled to help law students of color. Gassman laid out his ideas and sorted through what he thought would be the most beneficial. He contacted a professor at Stetson who he had previously worked with for a different award program and presented the idea. The professor loved the idea of a fellowship dedicated to helping students of color who are interested in estate planning, he put Gassman in contact with Stetson's Black Law Student Association's president, an estate-planning professor, and an elder law professor. Stetson was more than thrilled to get this opportunity going.



POINTS OF CONTACT

Rebecca Morgan - Professor of Law, Boston Asset Management Chair in Elder Law and Director, M.J. in Healthcare Compliance - morgan@law.stetson.edu

Roberta Flowers - Professor of Law and Director, Center for Excellence in Elder Law - flowers@law.stetson.edu

Tomeka Jackson – Administrative Support - tdjackso@law.stetson.edu

Theresa Radwan - Interim Dean and Professor of Law - radwan@law.stetson.edu

OVERVIEW OF FELLOWSHIP

Two students of color will be selected for the two-semester fellowship beginning in the fall of 2023. Each Fellow will receive an award of \$1,500 per semester. The Fellows will become members of one of the local Estate Planning Councils, by attending the respective group's monthly breakfast or lunch meetings. Each student will be assigned two mentors who are active in the estate planning community. They will meet, shadow, and work with lawyer members of Estate Planning Councils to improve their communication skills, network with the community and learn about estate planning and elder law as a career. An additional objective of the program is to enhance the employment opportunities of the Fellows. Fellows will also (at their choosing) be provided with paid clerking positions with one or more Council members.

Each Fellow, working with their mentors, will create an educational presentation on estate planning and end-of-life documents. They will arrange for the presentation or co-presentation to be given at a location where people of color gather (for example Community Centers or Churches). Their mentor or mentors will accompany them when they do the presentation. Hours spent creating the presentation, arranging the presentation, and giving the presentation will count as legal pro bono for Stetson's pro bono requirement. If requested the presentations can be recorded or replicated for a national audience such as the National Association for Estate Planning Councils. The Fellows will also have the opportunity to present in national Webinars on estate planning topics if they would like to do so.

Applications for this fellowship and award will be processed through the Stetson Financial Aid and Awards Committee, who will select the Fellows. The two students chosen will be selected for an academic year (Fall and Spring Semesters) and each will receive recognition as Fellows and receive a financial award of \$1,500 per semester.

REQUIREMENTS

Submit a 250 word or longer memo on why you believe that you are a good fit for this Fellowship and Award, and two references.

What an Estate Planning Council needs to do if they want to be involved:

1. Contact Alan Gassman at agassman@gassmanpa.com. He will put you in contact with a local law school.
2. The law school will provide a contact person for the Black Law Student Association or Diversity Committee and for the professor who oversees fellowships.
3. Pitch the idea to your estate planning council for support and feedback.
4. Set up a meeting with the Black Law Student Association or Diversity Committee to review the fellowship and get feedback.
5. Create the criteria a student would need to meet in order to be considered.
EX: They would need to be a student of color, have a history in estate planning whether that be a class, volunteer work, internships etc., and have at least a 2.0 GPA.
6. Create the requirements that the fellows will have to follow once awarded.

EX: The Fellows will become members of one of the local Estate Planning Councils, by attending the respective group's monthly breakfast or lunch meetings. Each student will be assigned two mentors who are active in the estate planning community. They will meet, shadow, and work with lawyer members of Estate Planning Councils to improve their communication skills, network with the community and learn about estate planning and elder law as a career. Each Fellow, working with their mentors, will create an educational presentation on estate planning and end-of-life documents. They will arrange for the presentation or co-presentation to be given at a location where people of color gather (for example Community Centers or Churches). Their mentor or mentors will accompany them when they do the presentation. Hours spent creating the presentation, arranging the presentation, and giving the presentation will count as legal pro bono for Stetson's pro bono requirement. If requested the presentations can be recorded or replicated for a national audience such as the National Association for Estate Planning Councils. The Fellows will also have the opportunity to present in national Webinars on estate planning topics if they would like to do so.

7. Coordinate with the professor who oversees fellowships and create a draft agreement between the school and the sponsor that covers student criteria, how often the fellowship will be awarded, how much will be awarded to the fellow, what they will have to do once they receive the award and anything else that may be pertinent.
8. Finalize the agreement and start advertising the fellowship to the school.
9. Spread the news to promote more diversity fellowships in other law schools.

What a school needs to do if they want to be involved:

1. If a school wants to have someone sponsor the fellowship they should contact Alan Gassman at agassman@gassmanpa.com.
2. If someone is seeking out a law school to sponsor a fellowship they should put the sponsor in contact with the Black Law Student Association or Diversity Committee.
3. Pitch the idea to your local estate planning council for support and feedback.
4. Set up a meeting with the Black Law Student Association or Diversity Committee and potential sponsors to review the fellowship and get feedback.
5. Create the criteria a student would need to meet in order to be considered.

EX: They would need to be a student of color, have a history in estate planning whether that be a class, volunteer work, internships etc., and have at least a 2.0 GPA.

6. Create the requirements that the fellows will have to follow once awarded.

EX: The Fellows will become members of one of the local Estate Planning Councils, by attending the respective group's monthly breakfast or lunch meetings. Each student will be assigned two mentors who are active in the estate planning community. They will meet, shadow, and work with lawyer members of Estate Planning Councils to improve their communication skills, network with the community and learn about estate planning and elder law as a career. Each Fellow, working with their mentors, will create an educational presentation on estate planning and end-of-life documents. They will arrange for the presentation or co-presentation to be given at a location where people of color gather (for example Community Centers or Churches). Their mentor or mentors will accompany them when they do the presentation. Hours spent creating the presentation, arranging the presentation, and giving the presentation will count as legal pro bono for Stetson's pro bono requirement. If requested the presentations can be recorded or replicated for a national audience such as the National Association for Estate Planning Councils. The Fellows will also have the opportunity to present in national Webinars on estate planning topics if they would like to do so.

7. Coordinate with the professor who oversees fellowships and the sponsor to create a draft agreement between the school and the sponsor that covers student criteria, how often the fellowship will be awarded, how much will be awarded to the fellow, what they will have to do once they receive the award and anything else that may be pertinent.
8. Finalize the agreement and start advertising the fellowship to the students.
9. Spread the news to promote more diversity fellowships in other law schools.

What a student needs to do if they want to apply:

1. If the opportunity arises where your school is offering a diversity fellowship contact the professor in charge and coordinate what you may need to do
2. Review the requirements listed and make sure you meet them.
3. Review the requirements you will have to meet if you win and make sure you can commit to them.

4. Apply for the fellowship before the deadline.
5. Wait for the announcement of the winners.
6. Apply again.

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