

ESTATE PLANNING COUNCIL DIVERSITY FELLOWSHIP & AWARD SAMPLE

About this Document

This document is based on a Fellowship in place at the Stetson University College of Law created in conjunction with Alan S. Gassman, JD, LL.M. (Taxation), AEP® (Distinguished) of Gassman, Crotty and Denicolo, P.A. and the Suncoast and Pinellas County Estate Planning Councils. It is being offered to estate planning councils and individual members of the National Association of Estate Planners & Councils as a resource, should they be interested in creating a similar program.

We are grateful to Alan Gassman, the Suncoast and Pinellas County Estate Planning Councils, and the Stetson University College of Law for their work.

Purpose

The purpose of the Stetson Fellowship is twofold:

- To introduce estate planning and elder law as a viable career opportunity for students of color.
- To promote service to communities of color, which have been underserved in the areas of elder law and estate planning.



Your purpose in creating a fellowship or scholarship may be different, and that's OK! We encourage councils and individuals to explore their mission and values when creating such a program and to think broadly about aspects of diversity.

The Award & Application Process

Two students of color are selected for the two-semester Fellowship and receive an award of \$1,500 / semester.

Applications are processed through the Stetson Financial Aid and Awards Committee, who also selects the Fellows. The application consists of a 250-word or longer memo where the recipient shares why they are a good fit and two references.

Integration with the Estate Planning Council or Individual

Recipients receive a complimentary membership to the estate planning council, complimentary meeting attendance, and two mentors from the council's membership who will counsel the individual, allow the recipient to shadow, and share more about the professions of estate planning and elder law.



You may wish to structure the application process, candidate review, or other aspects of the program differently. Different regions may have different needs and the institutions available to you may vary.

Fellows are an excellent candidate for council members, interns for existing members, and may become a council's next generation of active members.

The Recipient's Commitment

Working with their mentors, each student will create a community education program on estate planning and end-of-life documents and present the information at a location where consumers have gathered (example: a church or library). In the case of the example Fellowship, this work will count as legal pro bono service to meet Stetson's requirements.

At the conclusion of the program, Fellows are expected to submit a report summarizing their experience and activities and the skills they acquired or enhanced to the estate planning council or program provider.

Getting Started

- Gain board of directors approval
For individuals exploring this process, we encourage you to connect with your local estate planning council during the early stages of the process.
- Connect with the law school or the diversity committee for the professor who oversees fellowships
- Create consideration criteria (sample criteria could be that the student be required to meet the program's attributes of diversity, have a history in estate planning, have a minimum GPA, etc).
- Create participation criteria
- Agree upon the council's integration with the program
- Draft and sign agreement with the school and sponsor (individual or council)
- **Spread the word!**
- Provide NAEPC with an update to admin@naepc.org, both as your council gets started and after the first year of having a program in place

Alan Gassman has agreed to serve as a resource for any estate planning council that wishes to be connected to a local law school. He can be contacted at agassman@gassmanpa.com. A council's board of directors is also likely an excellent source for referrals local to your area.