

| Preface

Wills, Trusts, and Estates: The Essentials (“*Essentials*”) provides a streamlined yet comprehensive presentation of wealth transfer law for an introductory law school course. This Third Edition of *Essentials* retains the core pedagogical features from prior editions: (1) summaries of each topic or doctrine; (2) a narrative question-and-answer format for analysis following each judicial opinion; and (3) problem sets patterned on actual litigated disputes.

The Third Edition brings our coverage up to date by incorporating summaries of, or citations to, recently decided cases illustrating current trends and debates. The accompanying teaching materials include more than 1,000 slides with additional recent cases professors may incorporate into their course materials. The Third Edition also enriches our prior coverage with findings from cutting-edge empirical research to provide students with a realistic sense of how the practice of trusts and estates operates today.

We are excited to publish a textbook that reflects our shared passion for teaching trusts and estates and hope you will enjoy this journey into this exciting field. We gladly invite feedback about your experience with these materials.

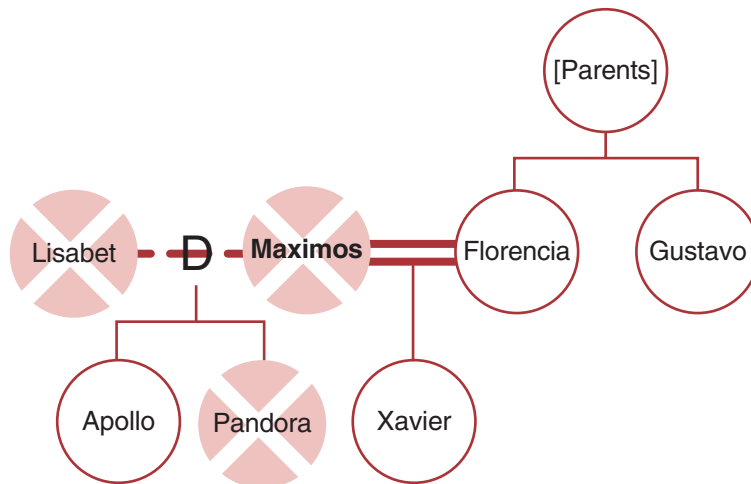
Reid Kress Weisbord
David Horton
Stephen K. Urice

November 2023

| A Note About the Diagrams

Block diagrams illustrate the relationships among relevant parties described in almost every judicial opinion. The diagrams use the following formatting conventions to describe various relationships and statuses:

- A circle represents an individual party mentioned in the case.
- A circle with a name that appears in bold type represents the party whose estate generated the litigation.
- An “X” superimposed on a circle indicates that the individual is deceased.
- A horizontal line connecting two circles represents a marital or former marital relationship between the parties.



For example, the diagram above illustrates Maximos’s familial relationships at the time of his death. Maximos was previously married to Lisabet, but that marriage ended in divorce. Maximos and Lisabet had two children, Apollo and Pandora. Both Lisabet and Pandora predeceased Maximos. Maximos was married to Florescia at the time of his death; they had a son, Xavier. Florescia has a brother, Gustavo.