

The American College of Trust and Estate, ACTEC, is committed to improving the trust and estate profession through life-long learning. Our trust and estate resources and educational materials provide lawyers, financial services professionals, and clients valuable information at no charge. Click on the headings to gain access to the highlighted resources or visit actec.org/professionals.



Resources for Wealth Planners and T&E Attorneys

ACTEC Fellows share their expertise through podcasts, publications, commentary, and videos.



ACTEC Trust and Estate Talk

Podcast series sharing in-depth information on topics

from electronic wills to bitcoin to opportunity funds and zones.

Wealth Advisor Resources

Easy access to materials such as Pocket Tax Tables, State Death Tax Chart, and Remote Notarization and Witness Order by State.



ACTEC Law Journal

Academic journal exploring tax, trust and estate topics, and dealing with practical consequences and applications of the rapidly changing rules in these areas of law.

ACTEC Engagement Letters

Publication offering recommendations and sample letters for creating a professional relationship with clients.



The ACTEC Commentaries on the Model Rules of Professional Conduct

The Fifth Edition takes account of amendments to the Model Rules adopted since the 2005 Fourth Edition, including those proposed by the American Bar Association Commission on Ethics 20/20 as adopted by the ABA in 2012 and 2013.

Resources to Share with Clients

The **ACTEC Family Estate Planning Guide** series asks Fellows to answer frequently asked estate planning questions. From advance medical directives to divorce considerations to utilizing positive psychology when creating a plan, the answers are available here in short videos for the public.



DE&I Resources

Planning for a Diverse and Equitable Future is a monthly video series that discusses issues surrounding racism and offers recommendations to combat inequality. The series has offered the legal profession practical recommendations for recruiting and retaining diverse people, tackled economic inequality, provided information for transgender information for how to change their legal name and gender marker on vital records, and more.

