

Life As An Estate Planning Clinic Intern, Part IV

By Kelly Jex
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As my time as an EPC intern draws to a close, so does my client files. Now begins the time to start closing out files. It is more complicated than it sounds, but never fear, the EPC provides all the guidelines and checklists you need to make sure you complete your work correctly.

Once documents have been executed, you are done meeting with your clients. But, your work is not done yet. Even though the documents are now signed and ready for your clients, your EPC file needs to be completed and organized for future reference. Student attorneys start by sending closing letters to their clients. These letters are a friendly reminder about what a client is supposed to do with all their paperwork. There is a fine line between presenting enough information to your clients and presenting too much information. You are not going to be there to explain the letter and everything a client has to do. And, theoretically, you would have already gone over all the information with your clients during document execution. The most important thing is state everything as clearly as you can.

This also applies to your closing memo as well. Just as you initially wrote an opening client memo, now it is time to close the file with a closing memo. The memo records how the document execution went, the capacity questions you asked the client, the witnesses and notary who were present, and how the document closing went.

Stay organized. There will be a lot of paperwork. Throughout this semester, I have gained knowledge of the law and how to be a lawyer. The law is always something you can research, but learning how to be a lawyer is gained through experience. It is only by putting yourself out there and jumping in with both feet will you ever learn how to be a lawyer. Being a good lawyer is about being able to counsel, listen, understand, evaluate, and anticipate. You know your clients, and you know yourself. Take confidence in that. And let Cooley's Estate Planning Clinic give you the experience you need to hone your skills as a real-life attorney.