To: **Madison Estate Planning Council Membership**
Re: **UW Student Volunteer Mentorship Opportunity**

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If you are interested in an opportunity to educate, influence and potentially impact our next generation of Wealth Advisors, then this message is for you.

I am currently instructing a 300 level, *Estate Planning for Financial Planners* course at the UW Madison, School of Business. Beyond learning the technical aspects of Estate Planning, the objective of this course is to also introduce students to the concept of a Multi-Disciplinary Team approach to Estate Planning.

Here's how you can help:
This fall, small teams of students will be working on two hypothetical estate planning case studies throughout the semester. The goal for each student team is to learn how to effectively procure and analyze qualitative and quantitative data, identify and prioritize goals, articulate current plan weaknesses and formulate alternative options. ***Your role, as a collaborating professional***, is to make yourself available to generally discuss the student proposed planning recommendations, provide guidance on the practicality of their plan, challenge them to explore any overlooked aspects of their plan and describe how your profession executes the Multi-Disciplinary Team Approach to Estate Planning.

If this opportunity to mentor aspiring college students and to possibly identify new talent is of interest, ***simply send me an email, with your contact information and indicate which area(s) of focus you are willing to assist***.

☐ Planning for the 99%	☐ Gift and Estate Tax Planning	☐ Special Needs Planning
☐ Charitable Trusts and Giving Strategies	☐ Planning for Non-Traditional Relationships	☐ Business Succession Planning
☐ The role of a Revocable and Irrevocable Trusts	☐ Wisconsin Probate & Community Property	☐ Estate Liquidity Issues & the Role of Insurance

Should you have any questions, do not hesitate to email or call me. I thank you in advance, for your time and consideration.

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