

## Evolution of a Pro Bono Project: “Wills for Heroes”

*By Phillip Long*

The popular “Wills for Heroes” project is an excellent example of an idea that other organizations have made “their own”—an initial project springs from a local need, other affiliates execute similar programs, and the project evolves and grows along the way. The first Wills for Heroes event in 2001 developed in reaction to the 9/11 atrocities. That single event grew to over twenty states having active, ongoing Wills for Heroes programs that have benefited countless first responders.

### **Need Identified, Program Spreads**

Anthony Hayes in Columbia, South Carolina, identified the initial need for his community. The September 11, 2001, terrorist attacks highlighted the sacrifices our first responders make for us and caused Hayes to question how we, as lawyers, might give back to them. He then contacted the local fire department in Columbia, asking that very question. A focus group then formed and concluded first responders needed estate planning services that they often could not afford.

Seeing this project’s tremendous benefit, other state bar associations began similar projects. For example, Susan Link, current Program Director of the Minnesota Wills for Heroes Program, states, “A local Minnesota police officer, while vacationing in Arizona, read an article about a ‘Wills for Heroes’ event. He then wrote a letter to the Minnesota State Bar Association, which inspired us to establish our own program.” Minnesota’s program now serves police officers, firefighters, EMTs, corrections officers, and their spouses.

### **National Coordination**

With popularity growing, Jeff Jacobson and Anthony Hayes further expanded the program by creating the Wills for Heroes Foundation to oversee the program’s nationwide expansion and connect volunteer attorneys with local first responders. The Foundation’s website, [www.willsforheroes.org](http://www.willsforheroes.org), contains a wealth of background information and planning tools for mounting an event.

The expansion then went one step further. The ABA YLD partnered with the Wills for Heroes Foundation to create a Wills for Heroes program as its 2007–2008 national public service program. The ABA YLD encouraged its affiliates to bring this program to their communities. North Carolina’s YLD, among others, took this encouragement, with the NC YLD first hosting an event in Charlotte.

The NC YLD then formed a Wills for Heroes Committee in July 2008 to create a continuing project. Since then, the Committee has coordinated nine Wills for Heroes events across North Carolina, serving over 1,500 first responders and their spouses and using over 500 volunteers. Even though this is an affiliate event, the North Carolina YLD has involved the North Carolina Bar Association’s Estate Planning Section and Paralegal Section, which provide senior attorney guidance, volunteer notaries, witnesses, and food donations. “We have even had community members of all ages volunteer at our events,” reports Jake Epstein, current co-chair for the North Carolina YLD Wills for Heroes Committee.

### **Local Implementation**

Staging each event follows a similar pattern. First, select a city. “Finding cities where successful events can be held is not hard—we currently have more requests than we can handle,” reports Susan Finch, current Co-Chair for the NC YLD Wills for Heroes Committee. Next, volunteers are recruited from the North Carolina YLD through the newsletter, e-blasts, and other communications, in addition to recruiting senior attorneys, paralegals, law students, and community members.

At the event, YLD volunteers meet with first responders and their spouses and offer to prepare a will, health-care power of attorney, and durable power of attorney. The attorneys are not required to have estate planning experience, though most programs limit the services to persons under a certain net worth, because of tax planning implications requiring more than a basic estate plan.

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A training session regarding estate planning is provided for the attorney volunteers on the day of the event, and donated “HotDocs” software provides a quick means to create the documents. Then, senior attorneys are present for difficult issues, and paralegals, law students, and others are available to notarize and witness the documents.

“By hosting so many events, we are able to streamline the process and host effective programs without having to build from the ground up,” reports Epstein.

### **Lasting Impact on Communities**

The evolution of Wills for Heroes is a great example of how affiliates can take other programs and make them “their own” to have a lasting impact on their communities. By making it “their own,” the program expands from a local idea to host an event to execute wills to a nearly national, ongoing program that can involve all levels of the legal community to execute estate planning documents for thousands of first responders.

For more information on the Wills for Heroes program, go to the main website at [www.willsforheroes.org](http://www.willsforheroes.org).

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