

## *Trusts & Estates* Editorial Guidelines & Process

*Trusts & Estates* is primarily a peer-review journal written by experts for professionals in the wealth management industry. Only a very few articles are reported by journalists.

We are always looking for writers with interesting ideas for articles. But please keep in mind that *Trusts & Estates* readers are professionals who have an average of 25 years experience serving the nation's wealthiest families; their clients have at least \$10 million in assets to invest. Articles must be timely, sophisticated, scholarly and cutting-edge.

**A note to expert authors:** Please check the *Trusts & Estates* online archive to see if the magazine already has published an article on your proposed topic—or to see what the magazine hasn't done yet, but should.

**A note to freelance journalists:** *T&E* also welcomes story suggestions from professional journalists versed in legal affairs or business. Please send clips, resume and story idea directly by email.

**A note to publicists:** If you're trying to publicize a product, service, person or company please send your press releases to [Rorie.Sherman@Penton.com](mailto:Rorie.Sherman@Penton.com). We will consider posting your press release online at [www.trustsandestates.com](http://www.trustsandestates.com) in the "From Industry Sources—Press Release Central" section.

**HAVE A NEWS TIP OR A STORY IDEA AND DON'T WANT TO WRITE IT UP?** Email to Rorie Sherman, editor in chief, *Trusts & Estates* magazine, [rorie.sherman@penton.com](mailto:rorie.sherman@penton.com).

**IF YOU WISH TO WRITE A FEATURE ARTICLE,** submit your ideas for articles by e-mail. Include:

- 1) a few paragraphs describing the article you would like to write;
- 2) a few paragraphs of biographical information showing the author's qualifications to write the article. Please be careful to disclose whether you have any commercial connection to the ideas your article discusses.
- 3) Send e-mail to Rorie Sherman, editor in chief, *Trusts & Estates* magazine, [rorie.sherman@penton.com](mailto:rorie.sherman@penton.com)

Your article suggestion and biographical material will be forwarded to the appropriate *T&E* advisory board members for review. They and the editors will decide whether the topic is appropriate for publication in the magazine.

Please email; do not telephone, to follow up your submission.

The review process and other pertinent information regarding article submissions are detailed below. Shorthand guidelines:

- article drafts are due in Microsoft Word by email at least two months before the issue date (for Jan. 1 issue, therefore, draft is sent to *T&E* Nov. 1);
- articles should be no longer than 2,500 words, excluding endnotes;
- try to limit endnotes; and
- every author needs to send a headshot photo (b & w or color, print or digital... if digital then a tiff or jpeg 300 dpi 8x10).

The editing process:

- (1) **IDEA PRESENTED**—A draft is submitted, reviewed by advisory board members; if no content adjustments required...
- (2) **LINE EDIT**—*T&E* editors line edit the article for general readability and to make it conform to magazine style and readability; all changes to piece will be shown in a redlined version sent back to author for review;
- (3) **FIRST AUTHOR REVIEW**—Authors accept/reject changes; answer editors' questions.
- (4) **COPYEDITING**—The piece is put into a layout and goes through two copyedits.

**(5) FINAL WRITER REVIEW—The author is PDFd a copy for FINAL WRITER REVIEW;**

**(6) SIGN OFF—The author telephones an editor with any corrections and/or answers to copyeditors' questions.**

**(7) The piece is published.**

*Important Note:* Articles slated for one issue may be published later, due to space and other considerations. There is no guarantee that a particular article will appear in a particular issue.

**Thank you for your interest in writing for *T&E*.**

**Sincerely,**

**Rorie Sherman**

*Additional Notes:*

- **Contracts**—All authors must sign writer's agreements prior to publication.
- **Deadlines**—Are set by the editors. Rule of thumb: Article ideas must be submitted about four months prior to issue date. Drafts are due two months prior to issue date.
- **Editorial Calendar** — Available online at *trustsandestates.com* Specific features and committee reports are designated for each issue. That means the editors are looking for articles specifically on those topics for those months. But any good topic will be considered for any month.
- **Length**—For Features: minimum is about 850 words; maximum is 2,500 words.  
For opinion writing: minimum is 700 words; maximum is 2,500 words.  
News items for briefing section can be as little as 200 words.

- **Online Archive**—is available to subscribers at *trustsandestates.com*. Please, before submitting an article idea, check to see if the magazine has written on the particular topic.

- **Peer Review**— *T&E* is primarily a peer-review journal. Advisory board members approve the article topic and drafts. They may make editorial suggestions. For a list of *T&E* advisory board members, visit *trustsandestates.com*

**Pictures**—All authors must submit a headshot photo for inclusion in the contributor's page.

- **Style Sheet**— An excellent guide available from the *T&E* editors.