Course Description:

Estate Planning is the sixth course in the *ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program*. This course covers the property ownership issues, taxation issues, planning documents, and implementation strategies that encompass effective estate planning.

Grading:

Successful completion of this course requires two elements: attendance at a minimum of 10 sessions of the live, instructor-led course sessions, and a passing score of 80% or better on the 25-question midterm and a passing score of 80% or better on the 25-question final exam.

Course Schedule:

The live, instructor-led sessions meet every other Saturday from 8:00 AM – 12:00 PM. It is expected that the students participate in the online lessons for each program according to their pace and schedule, provided that their assignments are aligned with the discussion/review in the instructor-led sessions.

Objectives:

By the end of this course, you will be proficient in the Fundamentals of Estate Planning. You will understand the probate process, the current transfer taxation in place in the United States, and how to properly plan for death and possible associated estate taxes.

Prerequisites:

Fundamentals of Financial Planning
Insurance Planning
Investments Planning
Income Tax Planning
Retirement Planning

Lessons:

Lesson 1: Property Ownership
Lesson 2: Wills, Estates and the Probate Process
Lesson 3: Understanding Trusts and Trust Documents
Lesson 4: Transfer Taxation I - Common Elements of Estate and Gift Taxes
Lesson 5: Transfer Taxation II - Transfers at Death
Lesson 6: Transfer Taxation III - Lifetime Transfers
Lesson 7: Transfer Taxation IV - Generation Skipping Transfers
Estate Planning Midterm Exam (25 Questions)
Lesson 8: Gift and Estate Valuation
Lesson 9: Income Taxation of Trusts and Estates
Lesson 10: Applications of Estate Planning
Lesson 11: Charitable Gifting Techniques
Lesson 12: Valuation and Freeze Techniques to Reduce Estate Tax Liability
Lesson 13: Case Study
Estate Planning Final Exam (25 Questions)

Textbook:

Title: Estate Planning
Publisher: Keir Educational Resources
Edition/Year: 2016 Edition

Instructor:

Clarissa S. Krinsky, MD, CFP®
Bio attached.