

Estate Tools

Demo Course

Course Description

Everyone needs to do estate planning. It is more than just planning for death. Estate planning is designing a program for effective wealth building, preservation, and disposition of property at the minimum possible tax cost. This course surveys wills, gifts, marital property, and probate avoidance. Designed to eliminate estate problems and taxes, the emphasis is on practical solutions that are cost effective. The text reviews and explains both federal gift and estate tax systems giving practice pointers and planning observations.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.

CPE Credits: 1 (CPA, EA)

Category: Taxes

Prerequisite: None.

Advanced Preparation: None

Course Learning Objectives

Lesson 1: Estate Tools

1. Identify the key participants and their roles in a coordinated estate plan and recognize pro-bate process including trust administration.
2. Identify specialized estate planning tools and how such tools save taxes and transfer wealth while accentuating asset control.