

Estate Planning - The Basics ©

Objective: This course will provide an overview of the goals, factors, and techniques often used by estate planners.

What you will learn:

- A review of important estate and gift tax provisions
- The information that is needed to do effective estate planning
- How title to property can be held and how it affects estate planning
- The pros and cons of holding title as joint tenants with right of survivorship
- The factors that should be considered in selecting an executor or trustee
- What are “probate assets” and what are not?
- When using a traditional Will is appropriate
- The advantages and disadvantages of using a revocable trust
- Planning opportunities for life insurance
- Planning tips for IRAs and 401(K) plans
- Strategies to avoid or minimize estate and gift taxes

CPE: 8 hours

Level: Basic/ Overview

Category: Tax

Prerequisites: None