

ESTATE PLANNING - LAW 604-001

Spring 2009
Monday/Wednesday 4:00 PM

Robert E. Ward, Esq.
Suite 800
7700 Old Georgetown Road
Bethesda, MD 20814
(301) 986-2200
Fax (301) 986-4155
rward@robertewardassociates.com

Text: John R. Price, Price on Contemporary Estate Planning
Federal Estate and Gift Taxes: Code & Regulations
Leimberg, et. al., The Tools & Techniques of Estate Planning

- 1/7 Administrative Matters
- 1/12 Introduction, and Overview
Price: Chapter 2
- 1/14 The Estate Planning Process and Practice
Price: Chapter 1
- 1/21 The Estate Planning Process and Practice; Writing Assignment
Price Chapter 1
- 1/26 Concurrent Ownership and Will Drafting
Price: Chapters 3 and 4
- 1/28 Will Drafting
Price: Chapter 4
- 2/2 Will Drafting, Powers of Attorney, and Living Wills
Price: Chapter 4
- 2/4 Revocable Trusts; Writing Assignment
Price: Chapter 5
- 2/9 Marital Deduction
Price: Chapter 5

- 2/11 Marital Deduction
Price: Chapter 5, Chapter 9 Part E
- 2/16 Non-Charitable Lifetime Transfers
Price: Chapter 10 Part F, Chapter 7
- 2/18 Non-Charitable Lifetime Transfers; Irrevocable Trusts; Income Shifting
Price: Chapter 10, Parts A, C, D
- 2/23 Will Assignment; Revocable Trusts
Price: Chapter 10, Parts B and E
- 2/25 Generation-Skipping Transfers
Price: Chapter 2, Part E
- 3/2 Generation-Skipping Transfers
Price: Chapter 2, Part E
- 3/4 Life Insurance
Price: Chapter 6
- 3/9 Spring Recess
- 3/11 Spring Recess
- 3/16 Life Insurance
Price: Chapter 6
- 3/18 Estate Freezing
Price: Chapter 9
- 3/23 Charitable Transfers
Price: Chapter 8
- 3/25 Charitable Transfers
Price: Chapter 8
- 3/30 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F
- 4/1 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F

- 4/6 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F
- 4/8 Planning for the Closely-Held Business Owner
Price: Chapter 11
- 4/13 Planning for the Closely-Held Business Owner
Price: Chapter 11
- 4/15 Post-Mortem Planning and Disclaimers
Price: Chapter 12
- 4/20 Asset Protection Planning
- 4/22 Asset Protection Planning

Additional materials will be distributed throughout the semester. All code and regulations sections referred to in Price are part of each assignment.

Class grades will be based on a series of writing assignments. Writing projects will include drafting client correspondence, drafting a will and trust, and preparation of a memorandum in response to a hypothetical.