ESTATE PLANNING - LAW 604-001

Spring 2012
Monday/Wednesday 4:00 PM

Robert E. Ward, Esq.
Suite 650
4520 East-West Highway
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

1/9 Administrative Matters

1/11 Introduction, and Overview
Price: Chapter 2

1/16 NO CLASS

1/18 The Estate Planning Process and Practice;
Price: Chapter 1

1/23 Concurrent Ownership and Will Drafting
Price: Chapters 3 and 4

1/25 Will Drafting
Price: Chapters 3 and 4

1/30 NO CLASS

2/1 NO CLASS

2/6 Will Drafting
Price: Chapter 4

2/8 Revocable Trusts
Price: Chapter 5
2/13 Revocable Trusts; Will Assignment
Price: Chapter 5

2/15 Marital Deduction
Price: Chapter 5

2/20 Marital Deduction
Price: Chapter 5, Chapter 9 Part E

2/22 Non-Charitable Lifetime Transfers
Price: Chapter 10 Part F, Chapter 7

2/27 NO CLASS

2/29 NO CLASS

3/5 Non-Charitable Lifetime Transfers; Irrevocable Trusts; Income Shifting
Price: Chapter 10, Parts A, C, D

3/7 Generation-Skipping Transfers
Price: Chapter 2, Part E

3/12 Spring Recess

3/14 Spring Recess

3/19 Generation-Skipping Transfers
Price: Chapter 2, Part E

3/21 Life Insurance
Price: Chapter 6

3/26 NO CLASS

3/28 NO CLASS

4/2 Charitable Transfers
Price: Chapter 8

4/4 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F

4/9 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F
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.