ESTATE PLANNING - LAW 604-001

Spring 2013
Monday/Wednesday 4:00 PM

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Text: Ray D. Madoff, et. al., Practical Guide to Estate Planning (Required)
John R. Price, Price on Contemporary Estate Planning (Recommended)
Federal Estate and Gift Taxes: Code & Regulations (Recommended)

1/7  Administrative Matters; Introduction
Madoff: Chapter 5

1/9  The Estate Planning Process and Practice;
Madoff: Chapter 1

1/14  Concurrent Ownership
Madoff: Chapter 2

1/16  Basic Estate Planning Documents;
Madoff: Chapter 3

1/21  NO CLASS

1/23  Will Drafting
Madoff: Chapter 3

1/28  NO CLASS

1/30  NO CLASS

2/4  Will Drafting
Madoff: Chapter 3

2/6  Trusts
Madoff: Chapter 4
2/11  Revocable Trusts; Will Assignment
   Madoff: Chapter 4

2/13  Marital Deduction Planning
   Madoff: Chapter 6

2/18  Marital Deduction Planning
   Madoff: Chapter 6

2/20  Non-Charitable Lifetime Transfers
   Madoff: Chapters 7, 8

2/25  NO CLASS

2/27  NO CLASS

3/4   Non-Charitable Lifetime Transfers; Irrevocable Trusts; Income Shifting
   Madoff: Chapter 8

3/6   Generation-Skipping Transfers
   Madoff: Chapter 9

3/11  Spring Recess

3/13  Spring Recess

3/18  Charitable Transfers
   Madoff: Chapter 10

3/20  Life Insurance
   Madoff: Chapter 12

3/25  NO CLASS

3/27  NO CLASS

4/1   Estate Planning for Business Owners
   Madoff: Chapter 11

4/3   Estate Freezing
   Other Reading

4/8   Estate Planning with Retirement Benefits
   Madoff: Chapter 13
4/10  Post-Mortem Planning and Disclaimers  
Madoff: Chapter 14

4/15  Cross Border Estate Planning

4/17  Asset Protection Planning

4/22  Expatriation Planning

Additional materials will be distributed throughout the semester. All code and regulations sections referred to in Madoff 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.