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

Administrative Matters; The Estate Planning Process and Practice
Price: Chapter 1

Introduction, and Overview
Price: Chapter 2

1/13 NO CLASS

1/15 NO CLASS

Concurrent Ownership and Will Drafting
Price: Chapters 3 and 4

1/27 Will Drafting
Price: Chapters 3 and 4

1/29 Will Drafting
Price: Chapter 4

2/3 NO CLASS

2/5 NO CLASS

2/10 Revocable Trusts
Price: Chapter 5

2/12 Revocable Trusts; Will Assignment
Price: Chapter 5

2/17 Marital Deduction
Price: Chapter 5

2/19 Marital Deduction
Price: Chapter 5, Chapter 9 Part E

2/24 NO CLASS

2/26 NO CLASS

3/3 Non-Charitable Lifetime Transfers
Price: Chapter 10 Part F, Chapter 7

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

3/10 Spring Recess

3/12 Spring Recess

3/17 Generation-Skipping Transfers
Price: Chapter 2, Part E

3/19 Life Insurance
Price: Chapter 6

3/24 NO CLASS

3/26 NO CLASS

3/31 Charitable Transfers
Price: Chapter 8

4/2 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F

4/7 Estate Freezing
Price: Chapter 9, Parts A, B, C, D, and F

4/9 Planning for the Closely-Held Business Owner
Price: Chapter 11
4/14 Post-Mortem Planning and Disclaimers
Price: Chapter 12

4/16 Asset Protection Planning

4/21 Expatriation 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.