

**Class Overview**

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| **General Class Information**  *All fields must be completed and posted in UVaCollab and World Viewable in SIS no later than two weeks prior to registration.* | | | | | |
| **Subject Area &**  **Catalog Number** | Certified Financial Planning 505-701 | **Class Title** | Estate Planning | |
| **Credit Type** | **Credit**  *Undergraduate*  *Graduate*  **Noncredit** | | **Delivery Method** | **P (In-Person)**  **CI (Classroom/Internet)**  **WB (Web-Based)** |

1. **Class Description (Use the SIS 400 characters from catalog description)**

The Estate Planning course covers a full range of topics related to the effective and efficient transfer of one's assets during life an at death.

1. **Learning Outcomes**

Upon successful completion of this course, students should be able to:

• Understand the Estate Planning; Understand where the investment process fits into the achievement of investor’s financial goals.

• The use of Trusts and Gifts as well as Charitable Gifts in the Estate Planning Process.

• The use of Life insurance to minimize Estate Taxes.

• Probate versus Assets Passing through Intervivos Trusts

• Basic Estate Planning Documents

• Transfers during Like and at Death

• Generation-Skipping Transfers

• Computation of the Estate Tax

• The Unlimited Marital Deduction

1. **Assessment Components**

There will be four tests each equally weighted 25%. Actice class participation is used when a students grade is borderline.

1. **Required Text (include ISBN, specific edition)**

Michael Dalton & Thomas Langdon. (2013). Estate Planning for Financial Planners. 7th Ed. Money Education. St. Rose, LA.

1. **Required Additional Resources and Technical Components**

None.

1. **Other Class Expectations (for Classroom/Internet and Web-Based classes, specify any live (synchronous) meetings dates, times, delivery mode)**

None.