ESTATE PLANNING
Course Notes: PROP 7008    Call Number: 000028

Semester: Spring 2014
Professor: Singler
Credits: 2 Classroom
Primary Basis for the Grade: Letter Grade; Exam
Prerequisites: Wills and Estates; Federal Income Tax Recommended but not required

Enrollment: Capped at 25
Meets Seminar Requirement? No
Meets Writing Requirement? No
Meets Client Counseling Requirement? No
Meeting Times: Wednesday, 4:40-6:30
Location: 100A

COURSE DESCRIPTION:
This course explores tax, non-tax, probate, non-probate and Medicaid aspects of planning for the transfer of family wealth. We will explore the practical aspects of an estate planning practice including drafting Healthcare Directives, General Powers of Attorney for finances, Last Wills, Revocable Living Trusts, client in-take interviews and how to charge lawyer fees. We will also explore the Probate Court process, including administering a probate estate, guardianships and adoptions. Medicaid issues considered include the desirability of planning to ensure that the government, rather than the family, is financially responsible for a parent or grandparent’s nursing home care, as well as specific planning techniques to achieve this result.

Last updated: 11-1-13 cc