# Principles of Financial Planning – Estate Planning

### Short Description

This course will provide participants with an understanding of the estate planning needs of wealthy clients, equip participants with potential solutions to those needs, and help participants to identify current sales opportunities.

### Long Description

This course provides participants with an understanding of the use of wills, trusts, and related documents in the estate planning process. The acquisition of this knowledge will equip participants with an understanding of the estate planning needs of wealthy clients, help participants capitalize on sales opportunities by identifying potential solutions, and greatly enhance participants’ confidence in discussing these matters.

Key topics include:

* The basic vocabulary of trusts and estates
* The different types of trusts and how they work
* Basic features that make trust solutions beneficial
* Common situations where trusts have application
* An overview of the estate planning process
* Explanation and demonstration of fundamental estate planning techniques, such as:
* The Credit Shelter [Applicable Exclusion] Trust
* Marital Trusts
* Gifting Strategies
* Interactive case studies to help participants understand the estate planning process as opposed to merely memorizing facts
* Advanced trust planning for specific needs:
* Charitable Remainder Trusts
* Charitable Lead Trusts
* Grantor Retained Trusts
* Irrevocable Life Insurance Trusts

**Continuing Education Credits**

CFP 8.00 hours

CTFA 16.00 hours\*