The course in estate planning focuses on the efficient conservation and transfer of wealth. It is a study of the legal, tax, financial, and non-financial aspects of this process, covering topics such as trusts, wills, probate, advanced directives, charitable giving, wealth transfers and related taxes.

At the successful completion of the Estate Planning course the student will be able

- To understand the universal nature of estate planning needs
- To recognize the high level of ignorance regarding estate planning among the general population as well as among students
- To comprehend the fundamental objective of greater efficiency in wealth transfer
- To appreciate the market driven nature of the profession
- To identify the dynamic nature of Estate Planning
- To distinguish the complexity of the subject
- To grasp the futuristic and contingent-based nature of estate planning

**Evaluation Methods:**

Technology Prep Assignment = 1%
Exams = 15% each = 30% total
Comprehensive Cases = 25%
Concept Check questions (e.g., Quizzes) = 10% each = 20% total
Projects = 12% each = 24% total

If you have any questions, please contact Heather Spencer at heather.spencer@fcs.utah.edu.