Finance 7348
Estate Planning
Fall 2024

Instructor: Lay Huang
Office Hours: By appointment
Email: ________

COURSE DESCRIPTION:

The course is designed specifically for students interested in pursuing careers in the financial planning profession and seeking to obtain the CERTIFIED FINANCIAL PLANNER™ designation.

The course and curriculum are approved by the CFP® Board of Standards and meets one of the educational components required to become a Certified Financial Planner ™

Topics studied will include:

ESTATE PLANNING

- Property Titling
- Estate planning documents
- Planning for incapacity
- Trusts
- Federal Transfer Tax
- Lifetime gifting
- Charitable deduction planning
- Postmortem planning

LEARNING OBJECTIVES:

Learning objectives for this class are those which are outlined in the CFP Board's Student-Centered Learning Objectives for each of the above topics.

CFP® Board Learning Objectives

TEXTBOOKS AND MATERIALS:

Kaplan FP 516 Estate Planning 2024 Edition

CLASS STRUCTURE:

We will go through all modules of the books.
Class will consist of discussing the important topics in each chapter.
Students will read each module and take a module quiz.

ONLINE MODULE QUIZZES:

After reading a module, you will be required to take a module quiz.

This is a graded assignment and will count towards your final grade in the class.

EXAMS:

We will have 2 tests and a comprehensive final.

This is meant to prepare the student for the types of questions seen on the CFP® exam. If you have been following the material and class discussions and doing well on the module quizzes, you should have no problems with tests and the final exam.

GRADING:

Average of Module Quizzes - 20% of Final Grade.
Average of Exams - 40% of Final Grade.
Average of Final Exam - 40% of Final Grade.

Grading Intervals:

A 90%+
B+ 85%+
B- 80%+
C+ 75% +
C- 70%+

D+ 65%+
D- 60%+
F <60%

PRE-SEMESTER ACTIVITIES:

1) Create an account with the CFP Board of Standards:

   CFP Board of Standards

   Click on Login (top right corner of page)
   Click on "create your online CFP Board account"
2) When in the classroom, please have a name tent showing the name you wish to be called on the desk in front of you. Make it professional.
3) Review the functions for Time Value of Money in your financial calculator.

WE WILL BE USING FINANCIAL CALCULATORS. BRING THEM TO CLASS.

You may use any financial calculator you are comfortable with however; in class we will be solving problems using the TI BA II Plus calculator.