Nebraska Wesleyan University

BUSAD 3760 Estate Planning

Catalog

2024-2025

Course Description

This course introduces federal gift, estate, and generation-skipping transfer taxes and the many planning techniques used to minimize the impact of these taxes on transfers of wealth. It also explores the income-tax effects of gifts and bequests, particularly the limitations of income-shifting to family members. The non-tax aspects of estate planning, including the estate planning process, property ownership, planning for incapacity, and planning for business owners, are examined, as is the need for estate planning documents for individuals, spouses, and unmarried couples. The course stresses the need for balancing tax and non-tax considerations in creating successful estate plans. The course and curriculum are approved by the CFP Board of Standards. This course is an online class offered through the Lower Cost Models Consortium.

Prerequisite(s): Grade of "C-" or higher in BUSAD 3710 General Principles of Financial Planning.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)