Nebraska Wesleyan University

BUSAD 3760 Estate Planning

Catalog

2026-2027

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.

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

This course is offered online through a consortium of accredited colleges and universities. Instruction is provided by faculty employed by partner institutions within the consortium, with technology and administrative support provided by Rize Education. Oversight of courses offered through the consortium are reviewed and approved by Nebraska Wesleyan University. Students register through Nebraska Wesleyan University and receive academic credit from Nebraska Wesleyan University.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)