OFFICIAL COURSE CATALOG

WILLS, TRUSTS, & ESTATE PLANNING™

PROTECT YOUR LOVED ONES & KEEP CONTROL OF YOUR ASSETS

WHAT?

Classroom Instruction on Professional Estate Planning Strategies

WHERE?

DFW-Area: UT Arlington, TCC Northeast, TCC Northwest, and Tarleton State Ft. Worth

WHEN?

Multiple Dates Offered in the Spring and Fall Semesters: Details Inside

REGISTER TO LEARN HOW TO:

- Protect your estate from probate, delays, and unnecessary legal fees
- Minimize taxes so you can transfer more wealth to the people you love
- Maintain privacy and control with trusts
- Safeguard from unexpected illness or accidents with powers of attorney and healthcare directives
- Learn the real difference between a will and a trust and decide which one is right for you
- What to do when a loved one dies
- Shield assets from creditors and the government

"We gained so much more than expected from this class! The teachers make the topic of estate planning relatable and easy to understand."

MARK W., BURLESON

TUITION: $69 PER PERSON, TEXTBOOKS INCLUDED

TARLETON STATE UNIVERSITY

UTA Continuing Education
DIVISION FOR ENTERPRISE DEVELOPMENT

Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES

TRUSTED EDUCATION FOR A SECURE FINANCIAL FUTURE

WHY ATTEND THIS CLASS?

Your estate plan is one of the most meaningful gifts you can give to the ones you love. Without the right strategies in place, your family could face confusion, conflict, court delays, or financial loss at a time when they need support the most. Many delay this process, not realizing the risks or the importance of making informed decisions early.

This class reveals the steps to keeping control of your assets and ensuring your wishes are honored. You'll uncover common mistakes that leave families vulnerable, learn how trusts and other tools can simplify everything, and gain the confidence to put an effective plan in place.

WHO SHOULD ATTEND?

This course is designed for you to help protect your loved ones and preserve your legacy as intended. We cover expert strategies for minimizing taxes, avoiding probate, organizing documents, and preparing for incapacity.

Most importantly, you'll leave with a personalized roadmap to keep you prepared, avoid unnecessary complications, and provide lasting security and peace of mind for the people you care about most.

THIS COURSE INCLUDES ACCESS TO THE FOLLOWING INTERACTIVE RESOURCES:

- Estate Planning Readiness Checklist
- Personal Values & Legacy Worksheet
- Incapacitation Preparedness Scorecard
- Document Storage Plan Worksheet
- Executor Readiness Guide
- Probate Cost Estimator Worksheet
- Probate Avoidance Options Checklist
- Gifting Strategy Planner
- Is a Trust Right for Me? Scorecard
- Estate Tax Exposure Estimator
- What to Do When a Loved One Dies Checklist
- Your Estate Planning Roadmap™

LETTER FROM A SATISFIED STUDENT

Dear Kelly,

My husband and I attended your Estate Planning class at UTA, and we've wanted to reach out ever since. I can't thank you enough for the comfort and reassurance you gave us, and we wanted to share how it truly changed our lives for the better.

I must admit that before your class, we were carrying around a lot of anxiety. We had done very little planning, and the thought of something happening to either of us filled us with dread. More than that, we didn't want to be a burden to our two adult children and our five grandchildren when we die.

But after class, the worry lifted. For the first time, I felt excited instead of overwhelmed. We used what we learned to build a thoughtful estate plan customized for us... one that addresses our biggest worries around the high cost of taxes, ensuring our children are provided for, to choosing the right executor and trustee. We even created a plan for our sweet dog, Missy! That alone brought us so much peace of mind.

The take-home textbook became a constant companion while we planned. The clear writing made it quick and easy to revisit whenever questions came up. We found it so useful that we gave it to our kids so they can start plans for their own families. Like you said during class, it's never too early to start. (See, we were paying attention!)

The most meaningful part to us was meeting with you afterwards for our private session. Your kindness and guidance helped us get going in the right direction, and we're so grateful. We look forward to seeing you again soon!

Sincerely,
Todd and Sharon R. from Fort Worth, TX

WHAT STUDENTS ARE SAYING ABOUT THIS COURSE

"After my husband passed, I felt overwhelmed with what to do for my children and grandchildren to make sure that I wasn't a burden on them. This course helped me decide on the right planning tools so at the time of my death, my family would be taken care of. I can't stress enough how important this course is."

DEBBIE K., FLOWER MOUND

"My husband and I have a blended family. To say estate planning was emotional and messy is an understatement. We were taught strategies that helped us handle the emotional side of estate planning and asset transfers to family. Anyone who has a more complicated family structure should take this course."

CINDY S., NORTH RICHLAND HILLS

WILLS, TRUSTS, & ESTATE PLANNING™ COURSE PREVIEW

ESTATE PLANNING FOUNDATION

Estate planning is more than documents; it's a strategic roadmap for protecting your family and ensuring your wishes are honored. This section illustrates what estate planning truly encompasses, why it's essential for everyone, and your different goals while living versus at death.

PLANNING FOR INCAPACITATION

Unforeseen illnesses and accidents happen all the time. Proper preparation is paramount to ensure that you maintain control over personal decisions that will affect you, as well as limit financial and emotional turmoil for your loved ones. This section reveals what is needed so that you have peace of mind over these key decisions.

KEEP CONTROL WITH WILLS

No one wants to be a burden to their loved ones. By having a will in place, you maintain control over key decisions at death and limit the financial and emotional toll on those you leave behind. This section reveals what a will does, when it's wise to revisit your will, and how this simple document can create peace of mind for those you love.

AVOID COSTLY PROBATE

The probate process can be complicated and costly, and most people think it is required. This section cuts through the confusion by explaining exactly what it is and how it works. Learn the costs and emotional considerations involved, and discover practical strategies to minimize or avoiding probate altogether. These informed decisions can ease the burden on your family.

TRANSFER ASSETS WITH EASE

There is always an easier way! This section highlights the power of direct transfers: fast, efficient tools that can streamline how your wealth moves to the next generation. Learn how these mechanisms work and how they can dramatically simplify estate settlement for your loved ones.

THE POWER OF A TRUST

Do you want even more flexibility and control than what a simple will offers? Then a trust may be right for you. In this section, you'll learn what they are, how they operate, and the many ways they can enhance your estate plan from shielding assets to managing wealth for future generations. Discover the pros and cons so you can determine whether a trust is right for your situation.

MINIMIZE ESTATE TAXES

In recent years, estate tax law has changed drastically. These taxes play a major role in estate planning, and understanding them can help you preserve more of what you've worked so hard to build. This section breaks down complex tax concepts into clear, practical insights. Learn the different taxes owed at death, and strategies on how to help avoid them.

ADVANCED ESTATE STRATEGIES

Advanced estate tools can unlock powerful ways to further preserve and transfer wealth. This section explores sophisticated strategies to secure your estate, and teaches what to do when a loved one dies. Begin your personalized plan that supports your legacy and family when it matters most.

SYLLABUS: OFFICIAL COURSE OUTLINE

I. FOUNDATIONS OF ESTATE PLANNING

- What Estate Planning Means & Why It Matters
- A Guided Introduction to the Planning Process
- Protecting What You Have: Key Goals During Your Lifetime
- Ensuring Your Wishes Are Honored at Death

II. PREPARING FOR INCAPACITATION

- What to Do When You Can't Speak for Yourself
- Incapacitation's Toll: Health, Wealth, & Family
- Legal Documents You Should Have in Place
- Organizing & Storing Your Documents for Maximum Protection

III. WILLS MADE CLEAR

- What a Will Is & Why Most People Need One
- Costs & Consequences of Dying Without a Will
- The Powerful Benefits of a Well-Crafted Will
- Limitations of a Will-Only Estate Plan
- When & How to Update Your Will

IV. AVOID COSTLY PROBATE

- Probate: What Happens Behind the Scenes
- Potential Benefits of the Probate Process
- The Financial & Emotional Costs to Consider
- Smart Strategies for Avoiding Probate

V. DIRECT TRANSFERS FOR SIMPLICITY

- Direct Transfers & How They Work
- Gifting During Your Lifetime: Pros & Cons
- Beneficiary Designations for Big Impact
- Streamlining Asset Transfer with TODs & PODs
- Joint Ownership Community Property in Texas

VI. TRUSTS: PROTECTION & CONTROL

- Trusts 101: What They Are & How They Work
- Benefits of Incorporating Trusts Into Your Plan
- Drawbacks & When Trusts May Not Be Needed
- Comparing Testamentary vs. Living Trusts
- Revocable vs. Irrevocable Trust Trade-Offs

VII. ESTATE TAX: PROTECT YOUR WEALTH

- Why It Feels Like You're Taxed Coming & Going
- Income Tax Essentials for Estate Planning
- Estate Tax: What It Is & Who It Affects
- Gift Tax Rules & Opportunities
- Generation-Skipping Transfer Tax Explained
- Capital Gains Tax and Inheritance
- Estate Taxes: Real-World Case Study

VIII. ADVANCED ESTATE STRATEGIES

- Bypass Trusts: Wealth for the Next Generation
- Irrevocable Living Trusts for Asset Protection
- QTIP Trusts: Provide for Spouse & Protect Heirs
- Special Needs Trusts :Lifelong Support
- Medicaid Planning & Long-Term Care Tools
- Miller Trusts: Meet Medicaid Requirements
- FLPs for Business & Legacy Planning
- Strategic Survivor Planning
- What To Do When a Loved One Dies

DID YOU KNOW?

63% of people who make more than $80,000 per year cite not having "gotten around to it" or "procrastination" as their primary reason for putting off estate planning.*

**Source: Caring.com*

THIS COURSE INCLUDES EVERYTHING YOU NEED TO LEARN

TRUE CLASSROOM EXPERIENCE

Wills, Trusts, & Estate Planning™ is designed to be both enjoyable and deeply informative. Led by a CERTIFIED FINANCIAL PLANNER™ and fiduciary expert, the material is filled with practical insights and real case studies. The setting encourages open discussion, allowing you to ask questions and fully engage in the learning experience.

HANDS-ON LEARNING GUIDE

You'll receive a course textbook created by your instructor filled with examples and interactive content to help understand each concept with ease. Written in clear, accessible language, this book is yours to keep and will serve as a reliable home reference long after class is over.

COMPREHENSIVE EDUCATION

Unlike typical financial seminars that only cover one topic, this program helps you understand the "big picture". You'll explore all the elements of estate planning and how they work together to protect your assets and your loved ones. The class is purely educational, and no financial products are discussed, promoted, or sold.

ONE-ON-ONE EXPERT SUPPORT

For personal questions or a deeper look into estate planning for your unique situation, you'll have the option to meet one-on-one with your instructor after the course at no additional cost. This private session is offered exclusively to students and is completely optional, but is not required.

MEET YOUR INSTRUCTORS

JOSH W. STRITTMATTER, CFP® CRC®

Josh has been teaching estate planning and several other financial subjects at DFW-area colleges and universities since 2010. His passion is education, and he believes knowledge and financial literacy are important for each and every person at all stages of life.

KELLY BUCHFINK, CFP®

Kelly has been in the financial industry since 2001 and enjoys applying her experience and expertise to helping others. She finds teaching extremely rewarding, and hopes that her students gain knowledge and inspiration to help them meet their financial goals.

IN PRAISE OF WILLS, TRUSTS, & ESTATE PLANNING™

"I didn't realize how much anxiety I was carrying around about my family's future until I took this class. Estate planning always felt cold, complicated, and intimidating, but the way it was explained here made everything feel manageable. For the first time, I feel a sense of peace knowing exactly what steps I need to take to protect the people I love most."

ROBERT F., ARLINGTON

"This class was far more meaningful than I expected. I came in thinking it would be a dry overview of legal documents, but instead it helped me understand the emotional importance of making these decisions early. I left feeling empowered and relieved even, like a weight I didn't know I was carrying was finally lifted off my shoulders."

AMY M., KELLER

"I've been avoiding estate planning for years because it felt overwhelming and, honestly, a little scary. But this class helped me realize that preparing these documents is actually an act of love. The teacher's patience and compassion made a huge difference. I finally feel ready to put a real plan in place for my children."

SUSAN V., SOUTHLAKE

"This class gave me something I didn't expect: some peace of mind. For years, I worried that I hadn't done enough to protect my wife, children and grandchildren if something were to happen to me. Now I know the documents that I need and what I need to set up, and exactly how to do it. It's a huge relief to finally have a clear path forward to make sure my family is protected."

MIKE L., GRAPEVINE

Click the button below to view available class dates and to begin registration.

CLICK TO REGISTER

Can't access the button above? Visit: financialclass.org/estate-dates to sign up.

OFFICIAL COURSE CATALOG

WILLS, TRUSTS, & ESTATE PLANNING™

PROTECT YOUR LOVED ONES & KEEP CONTROL OF YOUR ASSETS

REGISTER TODAY TO LEARN:

- How to avoid simple mistakes that leave grieving families vulnerable
- Strategies to secure assets, minimize taxes, and protect your legacy
- How to prepare for incapacity and safeguard your financial and healthcare decisions
- How to choose trustworthy executors, trustees, and guardians for minors
- Techniques for blended families, stepchildren, or special circumstances
- What actually happens if you pass away without a legal plan in place

TUITION: $69 PER PERSON, TEXTBOOKS INCLUDED

Click the button below to view available class dates and to begin registration.

REGISTER NOW

Can’t access the button above? Visit: financialclass.org/estate-dates to sign up.

TARLETON STATE UNIVERSITY

UTA Continuing Education
DIVISION FOR ENTERPRISE DEVELOPMENT

Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES