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 Avoid Probate and its Associated Costs, and Minimize Taxes
- The Benefits and Importance of Having an Estate Plan
- The Differences Between Wills and Trusts
- How to Plan for Incapacitation
- What to Do When a Loved One Dies
- Strategies to Protect Your 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 R., BURLESON

TUITION: $69 PER PERSON, TEXTBOOKS INCLUDED

TARLETON STATE UNIVERSITY

UTA Continuing Education
DIVISION FOR ENTERPRISE DEVELOPMENT

Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES

FINANCIAL EDUCATION FOR YOUR FUTURE

WHY ATTEND THIS CLASS?

Estate planning is complex and confusing. It is often one of the last items that people take care of because of procrastination or confusion. Now, more than ever, it is important to have a sound estate plan in place. Without an estate plan, you lose control of the distribution of your assets, and you may incur unnecessary costs and taxes. By attending this class, you will learn about how to protect your assets and gain control over decisions that will affect you and your family moving forward.

WHO SHOULD ATTEND?

This course has valuable information for everyone. We will discuss the many ways to plan your estate as well as teach you strategies you can use to protect your assets. You will learn how to choose between a will or a trust, how your estate will be taxed, and how to protect your assets from creditors and the government. Most importantly, this course provides the tools you need to make key decisions around planning your estate.

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

VIEW CLASS DATES

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

LETTER FROM A STUDENT

Dear Kelly,

My husband and I attended your Estate Planning class last fall. I wanted to thank you for all of the wonderful information you provided and share with you my story about how this class has changed my life for the better.

I must admit that before I took your class, I had done very little in regards to estate planning and was feeling anxious about what would happen if something happened to me or my husband. I didn't want to be a burden to our two adult children and five grandchildren when we die.

Now I feel empowered because we have completed our estate plan based on what we learned. We built a custom plan that has addressed our biggest worries around minimizing taxation on our estate, providing for our heirs and choosing who will serve as our executor and trustee. We even have a plan for our dog, Missy!

The textbook we received turned out to be an invaluable tool that we could reference whenever we had questions after the class. We loved the simple and easy to understand writing and graphs. We have actually given it to our children so that they can start planning for their family because you told us that it is never too early to get started. (See, we were paying attention!)

The best part was meeting with you afterwards to help us get started on our own personal plan. We look forward to seeing you again soon!

Sincerely,
John and Sharon R.,
Fort Worth

WHAT OTHER STUDENTS SAY 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

THE COURSE PREVIEW

ESTATE PLANNING FOUNDATION

A basic understanding of estate planning allows you to formulate a plan for what you would like to happen at death or in case of incapacitation. This section teaches the big picture of why estate planning is so important.

PLANNING FOR INCAPACITATION

Unforeseen illnesses and accidents happen all the time. Planning ahead for this is imperative to making sure that you maintain control over personal decisions that will affect you. 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 at death. By having a will in place, you maintain control over key decisions at death and make it much easier on those you leave behind. This section will help you understand what is required and how to put one in place.

AVOID COSTLY PROBATE

The probate process can be complicated and costly. Many people think you are required to probate your estate. This section illustrates how to avoid probate and its associated costs.

TRANSFERRING ASSETS

There is always an easier way! In this section, you will learn some incredibly easy ways to transfer assets to your loved ones without any hassle. You will also learn how these methods can save you time and money.

BENEFITS 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 will learn all of the ins and outs of the different types of trusts and how they can benefit you.

MINIMIZE ESTATE TAXES

They say the only two things guaranteed in life are death and taxes. Unfortunately, at death you may be exposed to a wide array of taxes. In recent years, estate tax law has changed drastically. This section outlines all the different taxes owed at death, and strategies on how to help avoid them.

ADVANCED ESTATE STRATEGIES

It's now time to discover the advanced strategies. In this section, discover expert strategies to further reduce costs and taxes. We discuss Medicaid and Long-Term Care costs. In addition, you will learn what to do next when a loved one dies.

THE COURSE OUTLINE

I. ESTATE PLANNING BASICS

- Estate Planning Defined
- Introduction to Estate Planning
- Objectives While Living
- Objectives at Death

II. PLANNING FOR INCAPACITATION

- What is Incapacitation?
- How Incapacitation Can Affect You
- Key Documents Needed
- What To Do With Your Key Documents

III. ALL ABOUT WILLS

- What is a Will and Do I Need One?
- Disadvantages of Dying Without a Will
- Advantages of Having a Will
- Disadvantage of a Will-Only Estate Plan
- When to Revisit Your Will

IV. PROBATE

- What is Probate?
- Advantages of Going Through Probate
- Costs Associated with Probate
- Avoiding Probate

V. DIRECT TRANSFER

- What is a Direct Transfer
- Gifting While You're Alive
- Beneficiary Forms: Don't Leave Home Without Them
- Account Registrations: TOD and POD
- Joint Ownership Community Property in Texas

VI. TRUSTS

- What is a Trust?
- Benefits of Trusts
- Disadvantages of Trusts
- Types of Trusts: Testamentary vs. Living
- Types of Trusts: Revocable vs. Irrevocable

VII. ESTATE TAXES

- Taxed Coming and Going
- Income Tax
- Estate Tax
- Gift Tax
- Generation Skipping Tax
- Capital Gains Tax
- Estate Tax Example

VIII. ADVANCED STRATEGIES

- Bypass Trust
- Irrevocable Living Trust
- Qualified Terminable Interest Property (QTIP)
- Special Needs Trust
- Medicaid Planning and Long-Term Care
- Miller Trusts
- Family Limited Partnerships
- Survivor Planning

DID YOU KNOW?

PROBATE CAN COST YOU UP TO 5-10% OF YOUR ESTATE'S VALUE*

*2024 http/info.legalzoom.com

THIS COURSE INCLUDES EVERYTHING YOU NEED TO LEARN

CLASSROOM INSTRUCTION

Wills, Trusts, & Estate Planning™ is both enjoyable and educational. Classes are led by a CERTIFIED FINANCIAL PLANNER™ who fills the presentation with valuable information as well as real-life examples to enhance understanding. This interactive format encourages student participation and questions.

COMPREHENSIVE LEARNING

Unlike financial seminars that focus on one topic, this course is designed to help you see the "big picture". You will learn about the many aspects of estate planning and how to build a successful plan for you and your family. This course is educational, and no financial products are discussed or sold.

COURSE TEXTBOOK

This course includes a textbook created by the instructor with examples and interactive material that is yours to keep. It is written in an easy-to-understand language and will help you follow along throughout the class.

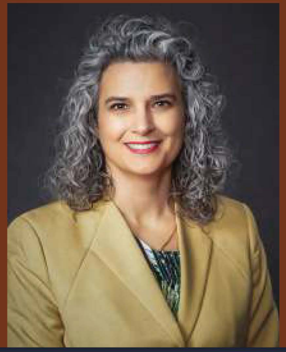
PRIVATE CONSULTATION

If you have questions that are personal or would like to find out more about estate planning, you may arrange to meet privately with your instructor after the course is complete. This consultation is complimentary for students, but is not required.

MEET YOUR INSTRUCTORS

JOSH W. STRITTMATTER, CFP® CRC®

Josh has been teaching estate planning and other financial subjects at local colleges and universities since 2010. His passion is education, and he believes knowledge and financial literacy are important for each and every person.



KELLY BUCHFINK, CFP®

Kelly has been in the financial industry since 2001 and enjoys applying her knowledge and experience to teaching. She enjoys educating others and hopes they gain understanding and inspiration to assist them in meeting their next financial goal.

MORE STUDENT TESTIMONIALS

"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

"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."

SARAH A., SOUTHLAKE

"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 P., KELLER

"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 grandchildren if something happened to me. Now I know the documents I need and exactly what I need to set up, and why it matters so much. It's a huge relief to finally have a clear path forward."

MIKE R., GRAPEVINE

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