Chapter 12

"Estate Planning Due Diligence and Case Design Studies"

Course Description: This course is designed to present the most professional concepts in developing an estate plan, step by step. The essentials bring forth actual estate planning cases from the first client interview to the plan's implementation. The students will learn the "big picture" in regards to all the educational principals taught in the National Institute's curriculum and the value of the professional "Team" to best serve the client's estate planning objectives. Because these case design studies relate to real people, real circumstances, and real solutions, the content author will supplement the case material with audio supportive information.

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Course Syllabus: Recommended Study Time = 2 Hours

Special Note: In all of the following case design studies, emphasis will be on the client's family circumstances, the collaborative role of each professional "Team" member, and how the final plan solved the client's estate planning needs. These case studies are presented in a "real world" universe to maximize the educational value of the National Institute's curriculum to the practitioner.

Hour 1: Introduction and Course Outline

Case Study I: Bottoms Up Estate Planning

Case Study II: Transferring Maximum Wealth

Case Study III: Avoidance of the "Government Plan"

Case Study IV: Hedging an Investment Portfolio

Case Study V: Remedial Solutions

Hour 2: Case Study VI: Referral Value of Service

Case Study VII: Traditional Estate Planning Goals

Case Study VIII: Traditional and Referral Results

Case Study IX: Business Sale Planning

Case Study X: The $20.0 Million Estate Plan

Course Review and Summary