Estate Planning First Class:

First Class Reading Assignment: Casebook Chapter 1

Read and brief under format Facts, Issue, Legal Resolution - People v. Berg, 629 P.2d 23
Hofstra University School of Law

Course Outline: Estate Planning

January 1, 2015

Text Book: Planning an Estate - A Guide Book of Principles and Techniques

First Class
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 1
Case review: People v. Berge, 620 P.2d 23
Class content: Introduction, Course Outline, Homework Assignment

Class Two
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 3
Case review: Will Construction 2 N.Y.2d 236
Class content: The Estate Plan, Wills and Revocable Trusts

Class Three
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 6
Case review: 26 Misc.3d 1205
Class content: The Role of Probate Costs in Estate Planning Administration
Class Four
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: No textbook review legal writing review
Case review: No case study
Class content: Detail Review of Course Writing Requirements

Class Five
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 2
Case review: 27 Misc.3d 274: 2011 WL 4822342
Class content: Estate Planning General Concepts of Estate and Gift Taxes

Class Six
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 4
Case review: 13 Misc.3d 1212
Class content: Estate Planning and The Marital Deduction, Second Marriages, Cohabitation, Second Homes and Pets

Class Seven
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 3, Sections 3.6 - 3.24
Case review: 17 Misc.3d 1017
Class content: Estate Planning Considerations for Spouse, Children and Special Needs People

Class Eight
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapters 5 & 7
Case review: 31 Misc.3d 594
Class content: Estate Planning and Trust Options
Class Nine

Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapters 5 & 7
Case review: 70 A.D.3d 661
Class content: Estate Planning and Trust Options Continued, Various Unique Trusts

Class Ten

Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 10
Case review: 92 N.Y.2d 436
Class content: The Role of Insurance in Estate Planning
WRITING ASSIGNMENT DUE

Class Eleven

Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapters 8 & 14
Case review: 87 A.D.3d 573
Class content: Estate Planning and Gifting

Class Twelve

Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapters 3 sections 3:21 - 3:24
Case review: 286 A.D.2d 684
Class content: Estate Planning Concerning Late Life Requirements, Living Wills, and the Health Care Proxy

Class Thirteen

Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapters 1, 9, 11 and 13
Case review: 51 A.D.2d 996
Class content: Estate Planning Annuities and Employee Benefits

Class Fourteen
Ethical question in regard to Estate Planning
Legal employment opportunities
Legal career development concerns
Casebook review: Chapter 12
Case review: 63 A.D.3d 1084
Class content: Estate Planning Considerations for Large and Small Business Owners