



- 
- 8            Income Tax Planning; Planning for Undue Asset Concentration; the Capital Gains Lock-In Problem.  
Hallman and Rosenbloom: Chapters 10 and 11  
Bulk Pack #13
- 10          Financing Education Expenses: Planning Strategies; Methods of Advance Funding; Section 529 Plans; and Coverdell Education Savings Accounts (Education IRAs).  
Hallman and Rosenbloom: Chapter 12
- 15          Retirement Planning and Social Security: Social Security Retirement Benefits and Planning; Employer Provided Retirement Plans.  
Hallman and Rosenbloom: Chapter 13
- 17          Retirement Planning: Individual Retirement Accounts and Annuities (IRAs).  
Hallman and Rosenbloom: Chapter 15  
Bulk Pack #12
- 22          Retirement Planning (concluded): Planning for Taking Retirement Plan Distributions; Planning for Other Employee Benefits.  
Hallman and Rosenbloom: Chapter 14 and 16
- 24          Insurance Planning and Personal Risk Management: Life Insurance and Social Security; Taxation of Life Insurance  
Hallman and Rosenbloom: Chapters 20, 21 and 29.
- 29          Estate Planning Principles; Methods of Property Disposition.  
Hallman and Rosenbloom: Review Chapter 25  
Bulk Pack #18
- Mar. 2      Federal Transfer Tax System; The Federal Estate Tax.  
Hallman and Rosenbloom: Chapter 26  
Bulk Pack #19
- 14          MID-TERM EXAMINATION (THIS DATE IS SUBJECT TO CHANGE WITH CLASS CONSULTATION. ALL EXAMS ARE ESSAY, CASE ORIENTED AND CLOSED-BOOK.)
- 16          Planning for Employee Stock Compensation Plans  
Hallman and Rosenbloom: Chapter 18  
Bulk Pack #13 and #14
- 21          Individual Investment Annuities  
Hallman and Rosenbloom: Chapter 17  
Bulk Pack #15

- 23            Insurance Planning and Personal Risk Management (continued): Life Insurance (Concluded); Disability Income Insurance; Health Insurance; Health Savings Accounts (HSAs). Hallman and Rosenbloom: Chapter 22
- 28            Insurance Planning and Personal Risk Management (concluded): Long-Term Care (LTC) Insurance; Medicaid (Elder Care) Planning; Property and Liability Insurance Planning.  
Hallman and Rosenbloom: Chapters 23 and 24.
- 30            Marital Deduction Planning; Postmortem Estate Planning; Estate Liquidity  
Hallman and Rosenbloom: Chapter 28  
Bulk Pack #17
- Apr. 4            Lifetime Giving & Other Intrafamily Transfer Techniques.  
Hallman and Rosenbloom: Chapter 27  
Bulk Pack #19
- 6            Charitable Giving.  
Hallman and Rosenbloom: Chapter 19
- 11            Will Substitutes; Property Management Arrangements; Gifts of Life Insurance and Life Insurance in Estate Planning; Irrevocable Life Insurance Trusts (ILITs).  
Hallman and Rosenbloom: Chapter 29 (remainder) and Chapter 30
- 13            Choice of Forms of Business Organization.  
Hallman and Rosenbloom: Chapter 31  
Bulk Pack #20
- 18            Disposition of Business Interests; Business Continuation Problems - Partnerships (Buy-Sell Agreements).  
Hallman and Rosenbloom: Chapter 31
- 20            Disposition of Business Interests: Business Continuation Problems - Closely Held Corporations (Buy-Sell Agreements and Retention Arrangements).  
Hallman and Rosenbloom: Chapter 31
- 25            Planning for Other Interests: Family Limited Partnerships; Nonqualified Deferred Compensation and Other Business Uses of Life and Health Insurance.  
Hallman and Rosenbloom: Pages 642-646 (of Chapter 27) and pages 361-364 (of chapter 14)  
Bulk Pack #21
- 27            Review and Catch Up Session  
REGULAR FINAL EXAM (CUMULATIVE)  
Monday, May 2, 9:00 am to 11:00 a.m.