

- 6 Income Tax Planning; Planning for Undue Asset Concentration; the Capital Gains Lock-In Problem.
Hallman and Rosenbloom: Chapters 10 and 11
Bulk Pack #13
- 8 Financing Education Expenses: Planning Strategies; Methods of Advance Funding; Section 529 Plans; and Coverdell Education Savings Accounts (Education IRAs).
Hallman and Rosenbloom: Chapter 12
- 13 Retirement Planning and Social Security: Social Security Retirement Benefits and Planning; Employer Provided Retirement Plans.
Hallman and Rosenbloom: Chapter 13
- 15 Retirement Planning: Individual Retirement Accounts and Annuities (IRAs).
Hallman and Rosenbloom: Chapter 15
Bulk Pack #12
- 20 Retirement Planning (concluded): Planning for Taking Retirement Plan Distributions; Planning for Other Employee Benefits.
Hallman and Rosenbloom: Chapter 14 and 16
- 22 Insurance Planning and Personal Risk Management: Life Insurance and Social Security; Taxation of Life Insurance
Hallman and Rosenbloom: Chapters 20, 21 and 29.
- 27 Estate Planning Principles; Methods of Property Disposition.
Hallman and Rosenbloom: Review Chapter 25
Bulk Pack #18
- Mar. 1 Federal Transfer Tax System; The Federal Estate Tax.
Hallman and Rosenbloom: Chapter 26
Bulk Pack #19
- 13 MID-TERM EXAMINATION (THIS DATE IS SUBJECT TO CHANGE WITH CLASS CONSULTATION. ALL EXAMS ARE ESSAY, CASE ORIENTED AND CLOSED-BOOK.)
- 15 Planning for Employee Stock Compensation Plans
Hallman and Rosenbloom: Chapter 18
Bulk Pack #13 and #14
- 20 Individual Investment Annuities
Hallman and Rosenbloom: Chapter 17
Bulk Pack #15

- 22 Insurance Planning and Personal Risk Management (continued): Life Insurance (Concluded); Disability Income Insurance; Health Insurance; Health Savings Accounts (HSAs). Hallman and Rosenbloom: Chapter 22
- 27 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.
- 29 Marital Deduction Planning; Postmortem Estate Planning; Estate Liquidity
Hallman and Rosenbloom: Chapter 28
Bulk Pack #17
- Apr. 3 Lifetime Giving & Other Intrafamily Transfer Techniques.
Hallman and Rosenbloom: Chapter 27
Bulk Pack #19
- 5 Charitable Giving.
Hallman and Rosenbloom: Chapter 19
- 10 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
- 12 Choice of Forms of Business Organization.
Hallman and Rosenbloom: Chapter 31
Bulk Pack #20
- 17 Disposition of Business Interests; Business Continuation Problems - Partnerships (Buy-Sell Agreements).
Hallman and Rosenbloom: Chapter 31
- 19 Disposition of Business Interests: Business Continuation Problems - Closely Held Corporations (Buy-Sell Agreements and Retention Arrangements).
Hallman and Rosenbloom: Chapter 31
- 24 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
- 26 Review and Catch Up Session
REGULAR FINAL EXAM (CUMULATIVE)
Monday, May 8, 9:00 am to 11:00 a.m.