

Introduction to Wills & Estates

Class I

Description	Time
Introduction to Wills & Estate Introduction to Estates EPTL v. UPC Inter vivos and testamentary gifts Real Property v. Personal Property Common Property	60
Types of Tenancy Joint Tenancies Tenant in Common Tenants by the Entirety	45
Introduction to CALI - Username and Password Setup Assignments: Distinction between Real Property and Personal Property Gifts I Gifts II Joint Tenancy Interstate Succession under the Uniform Probate Code (based on 2208 Amendments) The Execution and revocation of Wills Under the Uniform Probate Cods(Based on 1990 UPC and 2008 Amendments)	15

Class II

Description	Time
Intestacy Distribution Adopted, half and step-children Children from previous relationships	75
Using Retirement Plans as Estate Planning Devices	25

Class III

Description	Time
Wills Elective Share Predeceased Antilapse statutes	30
Preparing a Will - Using the DL Library	30

Discussion CALI Assignments Part I Distinction between Real Property and Personal Property Gifts I Gifts II Joint Tenancy Interstate Succession under the Uniform Probate Code (based on 2208 Amendments) The Execution and revocation of Wills Under the Uniform Probate Cods(Based on 1990 UPC and 2008 Amendments)	60
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Class IV

Description	Time
Trusts Types of Trusts Tax Implications Proxies (Planning for Incapacity)	60
Discussion CALI Assignments Part II Distinction between Real Property and Personal Property Gifts I Gifts II Joint Tenancy Interstate Succession under the Uniform Probate Code (based on 2208 Amendments) The Execution and revocation of Wills Under the Uniform Probate Cods(Based on 1990 UPC and 2008 Amendments)	60

Class V

Description	Time
Reducing Taxes and Other ways to Avoid Probate Federal Estate Tax Inheritance Tax Pay-On-Death- Accounts	50
Preparing an Estate Plan using the DL Library Closing remarks	70

Estate Planning Basics
Denis Clifford, Attorney
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