ESTATE PLANNING AND TAXATION

For our first class on Friday, January 13, please do the following:

(1) Sign up for the TWEN page for this course. The following will or have been posted on the TWEN page:

(a) Commentary on Estate Planning and Taxation
(b) Selections from English, et al., Tax, Estate and Financial Planning for the Elderly

(3) Dig out your copy of Principles of Wills, Trusts & Estates from the basic Estates and Trusts course. We will be using Chapter 15 of this book as a supplementary text.

(4) You will also need a copy of the Code. The Code you used in Basic Federal Income Tax is fine.

(5) For our class on Friday, January 13, read 15.1 of Principles of Wills, Trusts and Estates. Also read the first few pages of the Commentary, which lays out the course assignments for this course in great detail.

(6) A complete set of Powerpoint slides will be posted for the course as the course progresses.

The English Professor