Course Name: Estate Planning with Retirement Benefits

Course Number: 8614R

Professor: H. Joseph Price, Jr. and Heather L. Counts

Essential Prerequisites: Estates & Trusts; and some income tax knowledge

Desirable Prerequisites: Estate and gift tax

Course Books: Life and Death Planning for Retirement Benefits by Natalie Choate

Method of Grading & Appraisal of Student for Grade: Final exam

Summary Description of Course
This course covers the income tax, estate tax and gift tax implications of IRAs and Qualified Retirement Plans, including the receipt of distributions therefrom and the transfer of such amounts.

Course Content

Relevancy of Course for Career Purposes
More than half of the savings in the US is held in IRAs or Qualified Retirement Plans. For that reason, knowledge of this area is essential for estate planning attorneys, bankers, trust officers, accountant’s financial planners and anyone in the financial services area.

Relevancy of Course for MO/Multi-State Bar Examination: None