

### **3. Estate Planning**

- a. Estate Planning Introduction
- b. Estate Part 1, What is Estate Planning?- ppt
- c. Vocabulary Exercise
- d. Standard Estate Terminology
- e. Estate Planning Questionnaire
- f. Estate Part 2, Methods of Asset Transfer- ppt
- g. Probate Fees Worksheet
- h. Estate Part 3, Estate Tax Laws, Trusts and Insurance - ppt
- i. Treatment of Heirs in the Transfer Process
- j. Estate Planning Resources