Course Title: Estate Planning in Plain English
Course Code: WSP 254
Instructor: Julie Lanz

Course Summary:
Estate Planning in Plain English introduces basic estate planning concepts through the use of stories and examples. We will see how estate planning documents are practical tools for real-life situations. Course is limited in scope to domestic (U.S.) estate planning and does not address international estate planning issues.

*Please see course page for full description and additional details.

Grade Options and Requirements:
- No Grade Requested (NGR)

*Please Note: Due to its short format, this workshop may not be taken for Credit or a Letter Grade. Courses taken for NGR will not appear on official transcripts or grade reports. Proof of attendance will be provided at the end of the workshop.

Tentative Course Outline:
- What is an Estate Plan?
- What are Key Decisions in an Estate Plan?
  - Who gets what?
  - Who will be in charge?
- What are the Main Components of an Estate Plan?
  - Will
  - Power of Attorney
  - Trust
  - Advance Health Care Directive
  - Your Existing “Estate Plans”
    - Retirement and life insurance beneficiary designations
    - Joint tenancy assets
    - Intestate distribution under California law
- Do I Need to Worry About Estate Tax?
- Case Studies (throughout)
  - Single Sam
  - Youthful Young Family
  - Wealthy Windsors
  - Vulnerable Vicky
- Q&A (throughout)