

NITP

NATIONAL INSTITUTE
OF TRANSITION PLANNING, INC.

Course Title: Estate Planning
Target Audience: All Federal Employees
Length: 3 hours

This class is designed to provide the Federal employee an overview of estate planning issues and is taught by an estate planning attorney. Topics include:

- Overview of Estate Planning
- Lifetime Documents and Issues
 - Powers of Attorney
 - Health Care Directives
 - Temporary Guardianships and Health Care Powers of Attorney for Minors
 - HIPAA Authorization Forms
- Transfer of Assets other than by Probate or Trust
 - Joint Ownership
 - Transfer on Death by Beneficiary Designations
- Testamentary Planning
 - Probate
 - Wills
 - Revocable Living Trusts
- Death Taxes
 - Federal
 - State Specific Issue
- Estate Planning for Retirement Assets
- How to Find and Choose an Estate Planning Attorney

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