CONTACT INFORMATION

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REQUIRED RESOURCES

TEXTBOOK: Keir Educational Resources, Keir’s Estate Planning 
EPUB 9781937404680)

OTHER: Good internet connection, webcam and headset

OPTIONAL RESOURCE

Financial Planning. To order these study guides contact 
The College for Financial Planning at 1.800.237.9990.

COURSE PROCEDURE AND POLICY

We employ a hybrid approach (both face-to-face and online) to teach this class. Face-to-face 
classes comprise 24 hours, including three Saturdays and two Friday evenings. Saturday 
classes are from 8:00 a.m. – 2:00 p.m., and Friday classes are from 6:00 – 9:00 p.m. Online 
classes comprise 31.5 hours. Online meetings may include both one-on-one time with the 
instructor and meetings with the entire class. Students will need a good internet connection, a 
webcam and a headset for online meetings. Students must attend all face-to-face meetings and 
all required online meetings. The textbook, calculator and course packet are required for each 
face-to-face meeting.
**GRADES**

Mid-Term Exam: 40% of final grade – 40 questions – online – 90 minutes

Final Exam: 40% of final grade – 40 questions – online – 90 minutes

Application Problems: 20% of final grade – submitted online

70% is required to pass this course.

**COURSE OBJECTIVES**

Upon completion of this course, students will:
- Define and describe various strategies and forms of estate planning
- Identify outcomes of one estate plan versus another
- Formulate strategies to reduce estate tax liabilities with estate plan documents
- Evaluate fact patterns to determine optimal estate plans

**COURSE SCHEDULE**

<table>
<thead>
<tr>
<th>Week</th>
<th>Day</th>
<th>Mode</th>
<th>Topics</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Friday</td>
<td>O</td>
<td>Characteristics and Consequences of Property Titling; Methods of Property Transfer at Death</td>
<td>MC Questions for Topics 53 &amp; 54</td>
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<tr>
<td></td>
<td>Saturday</td>
<td>F2F</td>
<td>Estate Planning Documents Gifting Strategies</td>
<td>MC Questions for Topics 55 &amp; 56</td>
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<tr>
<td>2</td>
<td>Friday</td>
<td>O</td>
<td>Incapacity Planning Sources for Estate Liquidity</td>
<td>MC Questions for Topics 58 &amp; 60</td>
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<tr>
<td></td>
<td>Saturday</td>
<td>O</td>
<td>Powers of Appointment Types, Features, and Taxation of Trusts Qualified Interest Trusts</td>
<td>MC Questions for Topics 61-63 <strong>Mid-Term Exam</strong></td>
</tr>
<tr>
<td>3</td>
<td>Friday</td>
<td>F2F</td>
<td>Charitable Transfers Use of Life Insurance in Estate Planning</td>
<td>MC Questions for Topics 64 &amp; 65</td>
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<tr>
<td></td>
<td>Saturday</td>
<td>F2F</td>
<td>Marital Deduction Intra-Family and Other Business Transfer Techniques</td>
<td>MC Questions for Topics 66 &amp; 67</td>
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<tr>
<td>4</td>
<td>Friday</td>
<td>O</td>
<td>Fiduciaries Income in Respect of a Decedent (IRD)</td>
<td>MC Questions for Topics 70 &amp; 71</td>
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<td>Saturday</td>
<td>O</td>
<td>Postmortem Estate Planning Techniques Estate Planning for Non-traditional Relationships</td>
<td>MC Questions for Topics 72 &amp; 73</td>
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<tr>
<td>5</td>
<td>Friday</td>
<td>O</td>
<td><strong>Final Exam</strong></td>
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