

Do you want to become a Certified Estate Planner?

“CERTIFIED ESTATE PLANNER”

Certification Course Outline

This course is being offered by the Law Offices of Rex Crandell in cooperation with CALDA, the California Association of Legal Document Assistants.

Mission Statement and Purpose

Why was this Certified Estate Planner course created?

This course was created to give people the knowledge and confidence to prepare an estate plan for themselves, their families, or others. The purpose is to learn about the major estate planning concepts and documents and gain experience preparing all the documents included in a Comprehensive Estate Plan. This certification course is offered on a credit/no-credit basis. This means that grading will not get a letter grade nor include a line-by-line opinion of the class assignments that you turn in for credit. As you work through the course, you will be doing segments of an estate plan for homework. By the end of the course, you will have completed an entire comprehensive estate plan from start to finish. The subjects in your class assignments can (optionally) be from your own circumstances for your self-prepared Comprehensive Estate Plan.

Frequently Asked Questions

Who would benefit from taking this Certified Estate Planner course?

Anyone who is looking to learn more about what’s involved in creating an estate plan and wants to go through the steps of actually creating one themselves should take this course!

How do I receive my certification for completing the course?

Students that complete this course of study will be issued the “Certified Estate Planner” Certificate from the Law Offices of Rex Crandell in cooperation with CALDA by email. The Certificate is suitable for framing. You will also receive a CALDA Professional Estate Planner Badge.

How do I get the course material and the books for the course?

Everyone who signs up for the Certified Estate Planner course will receive a digital copy of the Estate Planning Book written by Rex Crandell at no additional charge. All course materials can be found at link below:

https://drive.google.com/drive/folders/1bAY8-DEwbm-Cj8GM_ARvzHSIdtDCFtEi?usp=sharing

Participants will also be required to purchase a second book titled “Every Californian’s Guide to Estate Planning” by Nolo Press. The Nolo Press book can be acquired from any third-party vendor. The course material is listed below for each section.

How much does it cost to take this course?

The “Certified Estate Planner” Certification course is a one-time investment of \$635. It is an investment in your future.

How do I sign up to take this course?

Sign-up details are found CALDA.org or call (916) 791-9100. Do it today.

Outline of the Certified Estate Planner Course

1. ESTATE PLANNING OVERVIEW

Class date May 26, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for the Estate Planning Overview.
- b. Read Chapter 1 in the Estate Planning book by Rex Crandell
- c. Read pages 1 through 38 in Every Calif. Guide to Estate Planning book by Nolo
- d. Answer the multiple-choice questions at the end of the chapter.
- e. Submit your Required Homework Cover Sheet to the school to indicate completion.

2. WILLS ~ LAST WILL AND TESTAMENT

Class date June 23, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for Wills
- b. Read Chapter 3 in the Estate Planning book by Rex Crandell
- c. Read pages 39 through 64 in Every Calif. Guide to Estate Planning book by Nolo
- d. Read pages 91 through 160 in Every Calif. Guide to Estate Planning book by Nolo
- e. Answer the multiple-choice questions at the end of the chapter.
- f. Submit your Required Homework Cover Sheet to the school to indicate completion.
- g. Prepare and submit a fully drafted, signed and witnessed will to indicate completion.

3. TRUSTS, Part 1

Class date July 28, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for Trusts, Part 1.
- b. Read Chapter 2 in the Estate Planning book by Rex Crandell through Page 37 not including Distributions to Beneficiaries.
- c. Read pages 65 through 90 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition and 2nd Edition of the book have the same pagination.
- d. Answer the multiple-choice questions at the end of the chapter for Trusts, Part 1.
- e. Submit your Required Homework Cover Sheet to the school to indicate completion.

4. TRUSTS, PART 2

Class date August 25, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for Trusts, Part 2.
- b. Read Chapter 2 in the Estate Planning book by Rex Crandell from "Beneficiaries" on page 38 to the end of the chapter on Page 50.
- c. Read pages 177 through 198 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition and 2nd Edition of the book have the same pagination.
- d. Read pages 251 through 276 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition. 2nd Edition of the book starts on page 247.
- e. Read pages 311 through 326 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition 2nd Edition version starts on page 307 through page 320.
- f. Answer the multiple-choice questions at the end of the chapter for Trusts, Part 2.
- g. Submit your Required Homework Cover Sheet to the school to indicate completion.
- h. Prepare and submit a fully completed and signed revocable trust, with notary section, to the school to indicate completion.

5. DURABLE POWER OF ATTORNEY for ASSET MANAGEMENT

Class date September 22, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for Durable Power of Attorney for Asset Management.

- b. Read Chapter 6 in the Estate Planning book by Rex Crandell starting on Page 111 through Page 138.
- c. Read pages 300 through 310 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition 2nd Edition of the book, read pages 296 through page 306
- d. Answer the multiple-choice questions at the end of the chapter for the Durable Power of Attorney.
- e. Submit your answer sheet to the school to indicate completion.
- f. Prepare and submit a fully completed and signed Durable Power of Attorney for Asset Management to indicate completion.

6. ADVANCE HEALTH CARE DIRECTIVE and END OF LIFE DECISIONS

Class date October 27, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for the Advance Health Care Directive and End of Life Decisions.
- b. Read Chapter 5 in the Estate Planning book Rex Crandell starting on Page 82.
- c. Read pages 281 through 299 in Every Calif. Guide to Estate Planning book by Nolo, 3rd Edition 2nd Edition of the book, read pages 277 through 295
- d. Answer the multiple-choice questions at the end of the chapter.
- e. Submit your answer sheet to the school to indicate completion.
- f. Prepare and submit a fully completed and signed Advance Health Care Directive to the school.

7. PROBATE

Home study. No separate class presentation. Homework and Documents due by Nov. 17, 2022.

- a. Read Chapter 4 in the Estate Planning book.
- b. Prepare fully completed and signed Judicial Council Forms DE-111, DE-121, DE-140, DE-147 and DE-150. Submit all forms at one time to indicate completion.
- c. Answer the multiple-choice questions at the end of the chapter.
- d. Submit your answer sheet to the school with your prepared documents to indicate completion.

8. INCOME TAXES FOR ESTATES AND TRUSTS

Class date November 17, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for the Income Taxes for Estates and Trusts.
- b. Read the class material provided with the video class (webinar).
- c. Read pages 225 through 238 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition 2nd Edition read pages 221 through 234
- d. Answer the multiple-choice questions at the end of the material.
- e. Submit your answer sheet to the school to indicate completion.
- f. Prepare Page 1 of IRS Form 1041 with one item of income and one item of deductions.
Prepare page 1 of IRS Form 1041, Schedule K-1 showing two items of income indicating that this is the last K-1 the beneficiary will be receiving.

9. CALIFORNIA REAL PROPERTY TAXATION and INTRODUCTION to ESTATE & INHERITANCE TAXATION.

Class date December 15, 2022 from 6 to 7 PM online with Zoom Audio Visual software.

- a. Watch the class material (webinar) for this section.
- b. Read the class material provided with the video class.
- c. Read pages 199 through 224 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition. 2nd Edition read pages 199 through 220
- d. Read pages 239 through 250 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition. 2nd Edition read pages 235 through 246

- e. Read pages 161 through 176 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition 2nd Edition Read pages 161 through 176
- f. Read pages 327 through 334 in Every Calif. Guide to Estate Planning book by Nolo 3rd Edition 2nd Edition read pages 321 through 329
- g. Answer the multiple-choice questions at the end of the material.
- h. Submit your Required Homework Cover Sheet to the school to indicate completion.
- i. Prepare one completed California real property deed transferring a parcel of real estate to a named trust. Include the Preliminary Change of Ownership Report (PCOR) Form BOE 502-A. Submit to the school to indicate completion.
- j. Prepare a Claim for Reassessment Exclusion for Transfer Between Parent and Child, Form BOE-58. Submit to the school to indicate completion.
- k. Prepare Page 1 of the IRS Form 706 United States Estate Tax Return showing a gross fair market value of the estate of \$100MM. Send to the school to indicate completion.

10. TAKE AND PASS THE FINAL EXAMINATION

- a. Final Exam will be available to take starting Dec. 15th, 2022.
- b. Final Exam must be completed by Jan. 15th, 2023.
- c. You must receive at least 70% correct on the Final Examination. The examination consists of 50 question multiple-choice questions. You must also submit the homework assignments that are accepted for credit.

DOCUMENT PREPARATION RESOURCES

READING MATERIAL

Every Californian's Guide to ESTATE PLANNING by NOLO

Available on Amazon - https://www.amazon.com/Every-Californians-Guide-Estate-Planning-dp-1413329373/dp/1413329373/ref=dp_ob_title_bk

Comprehensive Estate Planning Book by Rex L. Crandell

Available for purchase on Amazon - <https://www.amazon.com/Comprehensive-Estate-Planning-Leave-Without/dp/BOB8VNK9MH/>

You will receive each chapter of this book with your class materials at no additional cost to you.

DOCUMENT CREATION SOFTWARE

Below are a few programs for drafting Estate Planning documents

****Please note we are not affiliated with any of these companies****

Nolo's Quicken WillMaker & Trust (DESKTOP Version) – BEST LOW-COST ENTRY SOFTWARE

Price: \$99-\$199

Nolo's Quicken WillMaker & Trust gives you access to over 35 estate-planning documents, including a will, living trust, health care directive, and power of attorney.

Visit - WillMaker.com

Quicken WillMaker Premium 2022 is available for purchase on Costco's website.

Here's a link to their site just in case it's of interest:

<https://www.costco.com/CatalogSearch?dept=All&keyword=quicken+willmaker>

Fore! Trust (DESKTOP Version) – USED BY LEGAL FIRMS

Price: Initial cost starting at \$1,245 + yearly fees

Our software provides you with an automated process for the drafting and assembly of completely state specific estate planning documents.

Visit - ForeTrustSoftware.com

ADAPT (CLOUD BASED Version of FORE! Trust)

Price: Plans starting at \$399 Sign Up Fee + \$79/month

ADAPT provides estate planners and document preparers with a turnkey method of efficiently capturing client input and interview responses and transforming them into custom legal documents.

Visit - Adaptdocs.com

California Wills & Trusts (DESKTOP Version)

Price: Approximately \$1000

Fully automated document assembly product that enables you to create wills, trusts, powers of attorney and related documents by completing an electronic client interview that contains all the specific information the program needs to assemble the appropriate documents

Visit - store.lexisnexis.com

INDIVIDUAL ESTATE PLANNING FORMS (Not Software)

California Government Statutory Will - <https://bit.ly/statutory-will>

California Government Durable Power of Attorney - <https://bit.ly/durablepoa>

California Government Advance Health Care Directive - <https://bit.ly/castatahcd>

Advance Health Care Directive Form - <https://bit.ly/ahcdcalifornia>

5 Wishes Advance Health Care Directive- <https://bit.ly/five-wishes>

Kaiser Advance Health Care Directive - <https://k-p.li/3yR2Zmu>

California Judicial Council Court Forms - <https://www.courts.ca.gov/forms.htm>

FOLLOW REX CRANDELL ON YOUTUBE & FACEBOOK!

Rex Crandell Firm's YouTube channel offers free informational training videos on topics related to Estate Planning and Income Taxation. Like and Subscribe to the channel to get notified as new videos are uploaded!

<https://www.youtube.com/channel/UCW1pNmdS67x2lhp3qSuXUzA>

<https://www.facebook.com/rexcrandellfirm/>