Training Course on Estate Planning and Wealth Transfer in Retirement

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Estate Planning and Wealth Transfer in Retirement is designed to equip financial professionals with the essential knowledge and skills needed to guide clients through the complexities of estate planning and the transfer of wealth during retirement. This course focuses on the importance of effective estate planning in ensuring that clients? wishes are fulfilled, minimizing taxes, and providing for heirs. Participants will learn how to create comprehensive estate plans that align with clients' financial goals and family dynamics. The curriculum integrates theoretical concepts with practical applications, featuring case studies and interactive exercises that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-prepared to provide clients with robust estate planning strategies that enhance financial security and legacy preservation.

Programme Curriculum

Training Course on Estate Planning and Wealth Transfer in Retirement

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Course Objectives

1. Understand the fundamentals of estate planning and wealth transfer.
2. Analyze the components of a comprehensive estate plan.
3. Evaluate the implications of taxes on estate and wealth transfer.
4. Explore strategies for minimizing estate taxes.
5. Discuss the role of trusts in estate planning.
6. Develop skills in client communication regarding estate planning.
7. Assess the impact of healthcare decisions on estate planning.
8. Foster effective collaboration with legal professionals in estate matters.
9. Create actionable estate plans tailored to client needs.
10. Stay informed about emerging trends in estate planning.
11. Measure the effectiveness of estate planning strategies.
12. Identify tools and technologies for managing estate planning.
13. Prepare for client meetings and discussions on estate planning.

Target Audience

1. Financial advisors and planners
2. Wealth management professionals
3. Estate planning attorneys
4. Investment analysts
5. Compliance officers
6. Actuaries and actuarial analysts
7. Graduate students in finance or estate planning
8. Policy makers in financial management

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Estate Planning

- Overview of estate planning concepts and principles.
- Importance of estate planning in retirement and wealth management.
- Key terminology related to estate planning and wealth transfer.
- Historical context and evolution of estate planning practices.
- Case studies illustrating successful estate planning strategies.

Module 2: Components of a Comprehensive Estate Plan

- Identifying essential elements of an estate plan (wills, trusts, powers of attorney).
- Understanding the roles of executors and trustees.
- Techniques for organizing and documenting assets.
- Real-world examples of comprehensive estate plans.
- Tools for creating effective estate planning documents.

Module 3: Tax Implications of Wealth Transfer

- Overview of estate, gift, and inheritance taxes.
- Analyzing the impact of taxes on estate value and wealth transfer.
- Understanding tax exemptions and deductions relevant to estates.
- Real-life examples of tax planning strategies.
- Tools for assessing tax implications in estate planning.

Module 4: Strategies for Minimizing Estate Taxes

- Techniques for reducing estate tax liabilities.
- Evaluating the role of gifting and charitable donations in tax planning.
- Understanding the benefits of irrevocable trusts and other vehicles.
- Case studies on effective tax minimization strategies.
- Tools for calculating potential estate taxes and savings.

Module 5: The Role of Trusts in Estate Planning

- Overview of different types of trusts (revocable, irrevocable, special needs).
- Understanding the benefits and limitations of using trusts.
- Techniques for funding and managing trusts.
- Real-world examples of trusts in estate planning.
- Tools for setting up and administering trusts.

Module 6: Healthcare Decisions and Estate Planning

- Understanding the importance of healthcare directives and powers of attorney.
- Techniques for integrating healthcare decisions into estate plans.
- Evaluating the impact of long-term care on estate planning.
- Real-life examples of healthcare planning in estate contexts.
- Tools for documenting healthcare preferences.

Module 7: Collaborative Estate Planning

- Importance of collaboration with legal professionals in estate planning.
- Techniques for effective communication with clients about estate matters.
- Best practices for engaging family members in estate discussions.
- Real-world examples of collaborative estate planning.
- Tools for facilitating communication and collaboration.

Module 8: Implementing and Reviewing Estate Plans

- Steps for developing and implementing a comprehensive estate plan.
- Importance of regular reviews and updates to estate plans.
- Techniques for monitoring changes in laws and regulations affecting estates.
- Presenting estate plans and strategies to clients.
- Tools for tracking and managing estate planning documents.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.

- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to FINESKILL TRAINING CENTER account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	11 Sep 2026	Physical	$1,500
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500
19 Oct 2026	23 Oct 2026	Physical	$1,500

Start Date	End Date	Location	Price
26 Oct 2026	30 Oct 2026	Physical	$1,500

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com