Washington, D.C.
Estate Planning
Council
Founded 1940

Hariton Estate Planning Forum
Fundamentals Course in Private Wealth Planning

Goal: Each year's Hariton cohort will be a collegial networking and study group that will continue throughout the participants' careers, providing a peer group to consult with and rely on for advice and sponsorship as their careers progress.

Deans

Edward J. Beckwith, Esq., LL.M. – BakerHostetler
Sarah Moore Johnson, Esq., AEP®, Birchstone Moore LLC

2022 Dates

September 22
September 29
October 6
October 13
October 20

Fee:

Entry-level professionals of Council Members - $100 (includes all five sessions)
Council Student Members - $0
Registration limited to 35

Curriculum

Session I – Various Forms of Property Ownership and Common Ways to Transfer Wealth

Session II – Basic Trust Concepts and Fiduciary Obligations

Session III – The Estate Planning Team

Session IV – Planning with Life Insurance

Session V – Review of Tax Concepts Central to Estate Planning

All sessions will be held at the offices of BakerHostetler from 4:30 – 5:30 pm followed by a networking happy hour at a local establishment.
Register www.wdcepc.org