1. **Estate Planning** 
   1. Estate
   2. Wills
      1. Executor
      2. Types of wills
         1. simple will
         2. holographic will
      3. codicil
      4. Intestate
   3. Power of attorney
      1. Limited
      2. General
   4. Trusts
      1. Trustee
      2. Trustor
      3. Beneficiary
      4. Intervivos (living trust)
      5. Testamentary trust (trust will)
      6. Probate
   5. Joint Ownership
      1. Joint tenants w/ right of survivorship
      2. Joint tenants w/out right of survivorship
   6. Reverse mortgage
2. **Taxation of Estates** 
   1. Estate tax
   2. Inheritance tax
   3. Gift taxes
   4. Federal & state income tax
3. **Saving for Retirement** 
   1. Personal Retirement Accounts
      1. IRA
         1. Traditional IRA
         2. Roth IRA
         3. Education IRA
      2. Annuities
   2. Employer-sponsored Retirement Plans
      1. Defined -benefits Plan
      2. Defined-contribution plan
         1. 401(K)
         2. 403(b)
      3. Vested
   3. Government-sponsored Retirement Plans
      1. Social Security
      2. Military pension
4. **Medicare & Medicaid**
   1. Medicare
   2. Medicaid
5. **Other Notes**