Lofgren Teaches Estate Planning Class at SMU

July 1, 2009

Norm Lofgren is currently teaching an Estate Planning course in Southern Methodist University's Certification Program in Financial Planning. He has been teaching at SMU since 2004.

The SMU Certificate Program in Financial Planning is designed primarily to train those currently employed in the financial services industry who would like to build upon their prior professional experience and expand the breadth and value of their services. The program is designed to enable the student to acquire the educational requirements needed to sit for the CFP® Certification Examination. There are seven courses in the SMU Program: Fundamentals of Financial Planning 101; Insurance and Risk Management 102; Investments 103; Retirement Planning & Employee Benefits 104; Tax Planning 105; Estate Planning 106; and Financial Planning Strategies & Case Study (Capstone) 107. Each course meets for three hours once a week in the evenings. Courses are approximately one quarter, or 11 weeks, in length.

Norm's practice focuses on taxation, estate planning and family wealth protection and transfer. His experience as a former trial attorney for the IRS coupled with his extensive experience in income, estate, gift, generation-skipping tax matters and tax planning for closely held businesses enables Norm to create solutions that minimize tax exposure and preserve wealth.