The topic of this moderated discussion group is “estate-planning tips.” Rather than having a speaker talk about estate planning, the attendees will share their experiences with estate planning, they will be able to learn from the comments made by other attendees, and they will be able to ask questions about estate planning that knowledgeable and/or experienced attendees will volunteer to answer.

The main topics that will be discussed during this session are the following: TOD (transfer on death), POD (payable on death), wills, and revocable trusts.

Those who have undertaken estate planning can make a very important contribution to the success of this discussion group by providing information about the type of estate planning they chose to use and why they chose that particular type of planning. The sharing of “hands-on” experiences of others is often as valuable if not more valuable than reading about the topic.

Although not mandatory that attendees read the following Internet-based materials before attending this session, doing so might provide a minimum level of understanding that will be useful during the session. Following are the links to several resources:

http://www.investopedia.com/terms/p/payableondeath.asp
https://www.investopedia.com/terms/t/transferondeath.asp
https://www.thebalance.com/the-benefits-of-a-revocable-living-trust-vs.a-will-3505405

After the session is completed, some of the information the moderator used during the session will be uploaded to the OSU Emeriti Association Web site for interested parties to review. This information will also be under the moderated discussion group tab on the left margin.