Date: February 2006

I. **Course Name:** Administration of Wills, Trusts & Estates
Course Prefix & Number: PLG 235
Credit Hours & Contact Hours: 3 credit hours - 3 contact hours
Catalog Description:

This course will introduce the student to laws relating to estate planning, the administration of estates (both testate and intestate), and the establishment and administration of trusts. Emphasis will be placed on the practicalities of estate law including interview techniques, preparation of wills, trusts and administrative documents, and filing requirements and procedures. Prerequisite: PLG 100 & PLG 125 with a grade of C or better. Offered on a regular, rotating basis.

II. **Course Outcomes and Objectives**

Learning Outcomes:

The general goals of this course are to:

1. introduce the student to the role of the paralegal in the area of trust and estate administration
2. introduce the student to the laws governing trust and estate administration
3. give the student the training necessary to draft a will
4. introduce the student to the fundamentals of estate planning
5. introduce the student to the fundamentals of probate and estate administration with emphasis on court and filing requirements
6. train the student in the requirements of estate tax returns
7. introduce the student to trusts with emphasis on the formalities of creation

Relationship to Academic Programs and Curriculum:

The course is required for students matriculated in the Paralegal A.A.S. degree program. Students matriculated in other degree programs may take the course with the permission of the instructor

College Competencies Addressed by the Course:

The Administration of Wills, Trusts and Estates course addresses the following general competencies: writing, reading, ethics and values, information resources, global concerns, mathematics, problem solving and professional competency.

III. **Methods of Instruction**

Types of Course Materials:

Textbook

Methods of Instruction:

Lectures, guest speakers, class discussions and written assignments.

Assessment Measures:

Faculty may use a variety of assessment measures including, but not limited to: informal writing, non graded quizzes, and discussions

Methods of Evaluation:
ClassParticipation
Tests
Written Assignments completed and turned in on a timely basis.

<u>Work product may include but is not limited to:</u>
Preparation of a Will & Trust
Preparation of a Petition for Probate
Preparation of various Probate Documentation

IV. General Outline of Topics Covered

I. The Need for Wills & Trusts
II. Governing Law
III. Ethical Concerns in the area of Wills, Trusts And Estate Administration
IV. The Relation Between Property and Wills, Trusts & Estates
V. Death Testate
VI. Death Intestate
VII. The Requirements of a Valid Will
VIII. Codicils
IX. Revocation and Rejection of a Will
X. Will Contests
XI. The Initial Clients Interview
XII. Guidelines for Preparing A Will
XIII. Contents of a Standard Will
XIV Nontestamentary Documents: Advance Directives & Power of Attorney Trusts
XVI Estate Planning