COURSE INFORMATION FORM

DISCIPLINE Paralegal Practice
COURSE TITLE Wills, Trusts and Probate
CR.HR 3.0 LECT HR 3.0 LAB HR _______ CLIN/INTERN HR _______ CLOCK HR _______

CATALOG DESCRIPTION
An introduction and overview of estate administration, including legal principles and issues involved in the construction and administration of the various forms of wills, trusts, testate and intestate estates and related issues.

PREREQUISITES
PARA 100

EXPECTED STUDENT OUTCOMES IN THE COURSE
Upon completion of this course, the student will be able to:
1. Demonstrate knowledge of substantive and procedural laws that govern wills, trusts, and estates.
2. Describe the rules of transfer of property upon death.
3. Describe the nature and function of trusts.
4. Apply the methods for transferring property.
5. Explain difference between probate and non-probate property.

GENERAL EDUCATION OUTCOMES (ESO)
Specify which general education outcomes, if any, are substantially addressed by the course. Numbers in parentheses identify the Expected Student Outcomes linked to the specific General Education Outcome.

Outcomes (ESO)
1. Communication
   B. Reading Skills
      2. Recognize patterns of organization, transactions and relationships among ideas (1,2,3,4,5)
   C. Writing Skills
      2. Engage in writing as an open process that includes generating and revising, one-writing, drafting, revisions, proofreading/editing (4)
2. Lifelong Learning
   C. Attributes of an Awareness of the Convergence of Knowledge
      3. Synthesize information to facilitate application (1,2,3,4,5)
PROGRAM-LEVEL OUTCOMES

CAREER AND TECHNICAL EDUCATION PROGRAM OUTCOMES
Specify which Career and Technical program outcomes, if any, are substantially addressed by the course by completing the “Career and Technical Education template” to show the relationship between course and program outcomes to assessment measures.

The student will demonstrate:

1. Possession of a broad knowledge of substantive and procedural law
   a. A knowledge of the substantive and procedural law governing wills, trusts and estates
   b. A general knowledge of probate and non probate property
2. An ability to communicate clearly to draft a basic will

CLASS-LEVEL ASSESSMENT MEASURES
Student accomplishment of expected student outcomes will be assessed using the following measures. (Identify which measures are used to assess which outcomes.)

1. Examinations (Midterm and Final) (1,2,3,4,5)
2. Drafting of Will (4)
3. Oral participation (1,2,3,5)
Individual instructors may order this outline as fits the needs of their individual courses. In addition, they may place more emphasis on some areas than on others. What is assured is that this particular list is covered in the course. Other topics may be added to a course as the instructor sees fit, and as time and interest allow. An *asterisk can be used to mark an item as optional.

I. Introduction and Overview
   A. Course objectives and requirements
   B. Goals of estate planning
   C. The estate planning process and necessity for planning

II. Professional Responsibility in Estate Planning for Attorney and Paralegal
   A. Ethical handling of estate documents
   B. Due diligence, confidentiality, client service
   C. Paralegal assistance in issues of mental capacity and undue influence
   D. Fiduciary responsibilities

III. Methods of Transfer of Property other than by Will or formal Trust and the Impact on Estate planning
   A. Interstate succession
   B. Community property law/states
   C. Multiple ownership of property, i.e. joint tenancy, tenancy in common

IV. Limitations on right to dispose of Property at Death
   A. State statues regarding dower, courtesy, and spousal elective share
   B. Waiver of estate rights
   C. Family allowances

V. Estate Taxes and Inheritance Taxes (please note: this topic is sufficient for a separate course, but considerations of tax consequences is too important not to include an overview in this course.)
   A. The unified federal transfer tax and unified credit system
   B. The federal gift tax and annual exclusion
   C. Federal estate taxes and the taxable estate

VI. The Estate Planning Process
   A. The client interview
   B. An estate planning checklist
   C. Preparation and drafting of Wills

VII. Testamentary Gifts
   A. Bequests, devises
   B. Gifts per capita
   C. Future interests, rule against perpetuities