

Prepared by the Department of Social Sciences, Behavioral Sciences, and Human Services

Date of Departmental Approval: March 2014

Date Approved by Curriculum and Programs: May 2014

Effective: Fall 2014

1. **Course Number:** LGS136  
**Course Title:** Estate Planning, Wills, Trusts and Probate Procedure
2. **Course Description:** (formerly BIT136) This course covers the procedure, techniques and the substantive law in the planning of estates from simple wills to more complicated trusts. Students will also learn to administer the estate of the deceased and will study the tax consequences involved.
3. **Student Learning Outcomes** (instructional objectives: intellectual skills):  
Upon successful completion of this course, students are able to do the following:
  - Engage in critical thinking by reading, writing and explaining the history and evolution of wills, trusts, probate estates and procedures, as well as estate planning.
  - Describe the role of the paralegal in the specialized law office which concentrates in estate planning, wills, trusts and probate procedure.
  - Analyze estate planning facts, rules, laws and cases and describe the remedies in specific cases.
  - Apply cases and laws to specific sets of factual information and distinguish between fact and opinion.
  - Identify and formulate problems, and propose and evaluate solutions to estate planning and related questions.
  - Develop communication skills by organizing and presenting ideas in a logical order.
  - Respond to and build on ideas from readings as well as those generated in class and in study groups.
  - Draft estate planning documents, including wills, trusts, durable powers of attorney, health care proxies for application in the law office.
  - Engage in critical thinking with respect to objective and subjective viewpoints.
  - Evaluate laws and cases and apply them to the law office client's case.
  - Recognize moral and ethical dilemmas, and devise solutions.
4. **Credits:** 3 credits
5. **Satisfies General Education Requirement** No
6. **Prerequisites:** LGS130/BIT130
7. **Semester Offered:** Spring (even years)
8. **Suggested General Guidelines for Evaluation:** Students are evaluated by a combination of examinations and assignments. Students are expected to prepare legal documents and create a probate estate court filing, which when complete will be their own guide to these court procedures.
9. **General Topical Outline (Optional):**
  - Introduction to Estates; Pre-Probate Considerations; Estate Checklists;
  - Voluntary Administration; Probating an Intestate Estate; Probating a Will;
  - Will Contests & Compromises; Inventory & Appraisal;
  - Removal & Resignation of Fiduciaries; Options for the Spouse & Children;
  - Debts of the Decedent;
  - Distribution of Assets; Real estate sales; Sale of personal property;
  - Accounts; Fiduciary & Attys. Fees;
  - Estate Tax Returns;
  - Estate Planning Checklists; Wills;
  - Guardianships & Conservatorships;
  - Trusts;
  - Powers of Attorney, Health Care Proxies, Living Wills and Declarations of Homestead