COURSE TITLE: Estates, Trusts, and Probate

COURSE NUMBER: LES 411

PRE-REQUISITES: ENG121, English Composition I (minimum GPA 2.0/C)
ENG122, English Composition II (minimum GPA 0.67/D-)
LES 220, Introduction to Legal Studies (minimum GPA 2.0/C)
LES 314, Legal Research (minimum GPA 2.0/C)

LEGAL SPECIALTY: ☐ Yes ☑ No

I. COURSE DESCRIPTION

This course discusses the law of testamentary disposition; the common instruments used in testamentary dispositions; and the formalities for validity, construction, and interpretation of wills, trusts, and other post-death transfer devices. Emphasis will be placed on the probate process, estate administration, and federal and state tax concerns.

II. COURSE OBJECTIVES

GOAL A: Demonstrate an understanding of estate planning.

Learning Outcomes: The student will:
A-1 Identify the parties involved in estate planning and their respective roles.
A-2 Describe the paralegal and attorney roles in gathering information for estate planning.
A-3 Define the purpose of estate planning documents including wills, trusts, power of attorney, and advanced health care directive and their limitations.

GOAL B: Demonstrate an understanding of estate administration.

Learning Outcomes: The student will:
B-1 Define testate and intestate and explain the legal ramifications of each.
B-2 Explain the distinction between executor and administrator.
B-3 Describe the method by which a will disposes of assets.
B-4 Identify and be able to locate relevant state statutory and other resources related to estate administration.
B-5 Identify the parties involved in an estate administration and their roles.

GOAL C: Demonstrate an understanding of the legal procedures involved in the probate of an estate.
Learning Outcomes: The student will:
C-1 Describe the process of marshalling assets and valuation.
C-2 Identify the proper steps to initiate probate proceedings.