

COURSE SYLLABUS

LAST REVIEW	Spring 2021
COURSE TITLE	Wills, Trusts and Probate Administration
COURSE NUMBER	PRLG 0241
DIVISION	Social and Behavioral Sciences & Public Services
DEPARTMENT	Paralegal
CIP CODE	22.0302
CREDIT HOURS	3
CONTACT HOURS/WEEK	Class: 3
PREREQUISITES	PRLG 0121
COURSE PLACEMENT	Students must meet the correct placement measure for this course. Information may be found at: https://www.kckcc.edu/admissions/information/mandatory-evaluation-placement.html

COURSE DESCRIPTION

Included in this study of the administration of estates are techniques for fact gathering, use of trusts, will drafting, and probate procedures. This course is also appropriate for individuals with a general interest in wills and trusts.

Institutional Learning Outcomes

- Communication
- Computation and Financial Literacy
- Critical Reasoning
- Technology and Information Literacy
- Community and Civic Responsibility
- Personal and Interpersonal Skills

TEXTBOOKS

<http://kckccbookstore.com/>

METHODS OF INSTRUCTION

A variety of instructional methods may be used depending on content area. These include but are not limited to: lecture, multimedia, cooperative/collaborative learning, labs and demonstrations, projects and presentations, speeches, debates, panels, conferencing, performances, and learning experiences outside the classroom. Methodology will be selected to best meet student needs.

COURSE OUTLINE

- I. Estate Administration Participants
- II. Laws of Succession
 - A. Death Testate
 - B. Death Intestate
- III. Requirements of a Will
 - A. Modification
 - B. Revocation
 - C. Contests
- IV. Drafting a Will
- V. Trusts
 - A. Private Express Trusts
 - B. Personal Representatives
- VI. Probate Administration
 - A. Formal
 - B. Informal
- VII. Tax Considerations

COURSE LEARNING OUTCOMES

Upon successful completion of this course, the student will:

- A. CLO #1 The student shall be able to explain the purpose and need for a will.
- B. CLO #2 The student shall be able to define the terminology for property relating to wills, trusts, and estate administration.
- C. CLO #3 The student shall be able to discuss the participants and the proper court for a will administration.
- D. CLO #4 The student shall be able to determine distribution of an estate under testate and intestate succession.
- E. CLO #5 The student shall be able to explain the validity requirements and rules for modification, revocation, and will contests.
- F. CLO #6 The student shall be able to use checklists to prepare to draft a will.
- G. CLO #7 The student shall be able to draft a valid, legal will.
- H. CLO #8 The student shall be able to explain the essential elements of a trust.
- I. CLO #9 The student shall be able to explain the essential elements of a living trust.
- J. CLO #10 The student shall be able to explain the importance of an estate plan.
- K. CLO #11 The student shall be able to describe the duties of personal representatives.
- L. CLO #12 The student shall be able to describe special rules for small estate administration.
- M. CLO #13 The student shall be able to apply ethical principles relevant to paralegals to hypotheticals.

ASSESSMENT OF COURSE LEARNING OUTCOMES AND COMPETENCIES

Student progress is evaluated through both formative and summative assessment methods. Specific details may be found in the instructor's course information document.

COLLEGE POLICIES AND PROCEDURES

Student Handbook

<https://www.kckcc.edu/files/docs/student-resources/student-handbook-and-code-of-conduct.pdf>

College Catalog

<https://www.kckcc.edu/academics/catalog/index.html>

College Policies and Statements

<https://www.kckcc.edu/about/policies-statements/index.html>

Accessibility and Accommodations

<https://www.kckcc.edu/academics/resources/student-accessibility-support-services/index.html>.