

# Advanced Paralegal Certificate Course: Estate Planning – Probate, Wills & Trusts

## About This Course

This course explores the paralegal's role in estate planning. The requirements of creating enforceable wills and trusts will be covered, and study of resulting and constructive trusts will be provided.

### Instructor:

David P. Dougherty, J.D.

### Objective

Upon completion of this course, students will:

- Be familiar with the important probate and estate planning terminology.
- Recognize legal issues and where there may be estate or tax problems which need further research and/or investigation.
- Make general recommendations regarding case situations and understand when you need to do further research.
- Have a general familiarity with some common estate planning documents and forms.
- Draft common estate planning documents such as a will, revocable living trust and durable power of attorney.

### Expectations

You will be expected to spend an average of 8 hours per week reading and completing writing assignments. Please note that extensions will not be granted for this online course. 70% is the minimum passing score on all tests and assignments for this course. Students may consider working ahead in the curriculum if they have the time. Coursework in Estate Planning is equivalent to 45 clock hours of study.

### Prerequisites

Successful completion of Paralegal I and II, or equivalent experience.

### Course Books

#### Required textbooks for this course:

- ***Administration of Wills, Trusts, and Estates***, 5th edition, by Gordon Brown and Scott Myers. Delmar Cengage Learning, 2013

#### Highly Recommended Legal Resources:

- ***Oran's Dictionary of the Law***, 4th Edition, by Daniel Oran. Clifton Park: Delmar Cengage Learning

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For more information, call The Center for Legal Studies at 800-522-7737, or visit our [Online Store](#) to order.

## Reading Assignments

### **Lesson One:**

Read Chapters 1 through 3 in *Administration of Wills, Trusts, and Estates* (Admin)

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### **Lesson Two:**

- Read Chapters 4-6 in Admin
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### **Lesson Three:**

- Read Chapters 7-10 in Admin
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### **Lesson Four:**

- Read Chapters 11 & 12 in Admin
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### **Lesson Five:**

- Read Chapters 13 & 14 in Admin
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### **Lesson Six:**

- Review any chapters in your texts on subject areas that you feel you need additional instruction taking notes as you read. Send any questions you have to your instructor.
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## **Writing Assignments:**

There are two 100 point writing assignments due using standard form books such as West's Legal Forms or American Jurisprudence Legal Forms: the preparation of a Simple Will and a Revocable Living Trust for hypothetical clients. The writing assignments are due by the end of the course.

## **Tests:**

For lessons 1 through 5, you will submit your answers to a 100 point test covering the topics in that lesson's reading.

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## **Bulletin Board Assignments:**

You will also post your responses to six class participation assignments. These assignments are referred to as Bulletin Board Submissions and will be submitted by either selecting Bulletin Board Submission from within the lesson material, or by selecting 'Forums' under Activities on the Left Hand Block.

All lesson objectives, assignments, and tests can be found in the Lesson Materials.

## **Grading**

Your grade will be based on your completion of two writing assignment assignments, five tests, and class participation/Bulletin Board Submissions. The tests and writing assignments can be accessed from within the lesson material, or by selecting 'Assignments' under Activities on the Left Hand Block. You will have the opportunity to engage in "class participation" by using the Bulletin Board tool to respond to the bulletin board assignments throughout the course. Also, participating in the bulletin board assignments will enhance your understanding of the reading material.

## **Your final grade will be figured as follows:**

- The two writing assignments are worth 50 points each and comprise 30% of your grade.
- The five tests are worth 100 points and comprise 60% of your grade.
- Your participation in class participation assignments comprises 10% of your grade.

## **Withdrawal Policy**

Students may drop the course with a full tuition refund less a non-refundable \$15 administrative fee if written notice is sent to The Center for Legal Studies by email at [info@legalstudies.com](mailto:info@legalstudies.com) by the Wednesday before class begins. Students may drop the course with a 50% tuition refund if written notice is sent to The Center for Legal Studies by email at [info@legalstudies.com](mailto:info@legalstudies.com) anytime from the Thursday before the course begins until the first Thursday of class. After the first Thursday of class, no refunds will be issued.