

PLS 395

Estate Planning and Administration

Spring 2020/WEB

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Office Hours: As posted or by appointment

COURSE CALENDAR and TOPIC OUTLINE

WEEK	TOPIC	ASSIGNMENT
One (1/29)	Course Overview Blackboard Site Ethics in Estate/Probate Practice	Chapter 26 Discussion Board #1 (Introductory Post on Blackboard)
Two (2/5)	Intestate Succession Descent and Distribution	Chapters 1-4 Discussion Board #2
Three (2/12)	Powers of Attorney Blackboard	BB Posting Exercise #1
Four (2/19)		Exam #1
Five (2/26)	Living Wills Health Care Surrogates Blackboard	BB Posting Exercise #2
Six (3/4)	Non Probate Transfers	Chapters 13-17 Discussion Board #3
Seven (3/11)	Spring Break	No Assignment
Eight (3/18)	Wills	Chapters 5, 6, 7, 9 Exercise #3
Nine (3/25)	Will Revocation Will Contest Actions	Chapters 8, 10, 11 Discussion Board #4
Ten (4/1)		Exam #2
Eleven (4/8)	Dispensing with Estate Administration	Chapter 12
Twelve (4/15)	Estate Administration	Chapter 12 Exercise #4
Thirteen (4/22)	Tax Concerns	Chapter 24 Exercise (Extra Points)
Fourteen (4/29)	Trusts	Chapters 18-23 Exercise #5
Fifteen (5/6)	Elder Law	BB Posting Discussion Board #5
Sixteen (5/13)		Final Exam

NOTES:

1. Chapter references above are from the second edition of the textbook. If you are using another edition, you may need to make chapter adjustments according to the Table of Contents.
2. This course outline is preliminary in nature and may be revised as the semester progresses. A current syllabus will always be available on Blackboard.

ADDITIONAL COURSE INFORMATION:

A. Grading Values:

Exercises	6% each (6 x 5 = 30 points)
Discussion Boards	5% each (5 x 5 = 25 points)
Exams	15% each (3 x 15 = 45 points)
TOTAL	100 points

GRADES ARE WEIGHTED. In order to calculate your grade in the course, you should multiply your score on a particular assignment by the weight value assigned to get the actual points earned for that assignment. For example, if you receive a "91" on a project worth 15%, you will multiply $91 \times .15$, earning you 13.65 points for that project toward the total of 100 points available for the course. At the end of the semester, add up all actual points earned and final grades will be awarded according to the standard scale: 90-100, A; 80-89, B; 70-79, C; 60-69, D; Below 60, F.

B. Course Description/Learning Outcomes:

Students will receive instruction on various issues including legal ethics, intestate succession, estate planning, estate administration and tax liability. The curriculum will include labs and discussion boards geared toward the application of these legal concepts.

It is expected that students who successfully complete this course will be able to:

1. Identify the reasons why people do and do not estate plan;
2. Identify the basic estate planning tools and understand their utility;
3. Conduct effective legal research on estate planning and administration topics;
4. Interview clients to assist attorneys with estate planning and administration tasks;
5. Draft estate planning and administration documents and pleadings, including but not limited to powers of attorney, living wills, last wills and testament, trusts, petitions and orders;
6. Provide litigation support to attorneys practicing in this area; and
7. Apply the ethical rules and standards to the estate planning and administration practice.

C. ADA Accommodations:

In order for the Instructor to make appropriate accommodations for Students with learning or other disabilities, it is requested that the Student contact the Office of Equal Opportunity/ADA Compliance regarding his/her disability prior to the beginning of this semester.

D. Course Delivery:

This class is to be delivered online via Blackboard. All lecture materials, supplemental viewing materials, exercises, discussions boards and exams will be posted on Blackboard and graded work will be returned utilizing this platform as well. Typically, assignments will be posted on Wednesday of each week unless otherwise indicated on the course calendar above.

Students registering for this class **MUST:**

1. have regular and reliable access to the Internet; and
2. have the ability to create assignments in Microsoft Office Word format; and
3. have prior classroom experience with the Blackboard online platform; or
4. agree to complete the online Blackboard tutorials BEFORE class begins on 1/27/2020.

E. Participation:

Specific reading assignments, discussion boards and exercises will be made on the dates indicated above and posted on Blackboard. Due dates will be posted with each assignment. Participation and submission according to posted deadlines is required. It is the student's responsibility to monitor Blackboard for assignments and associated materials. The Instructor reserves the right to fail any student who fails to timely submit TWO online assignments. No make-up examinations will be administered unless the Student's failure to timely submit has been properly excused.

F. Honor Code:

This University and its colleges desire to maintain the highest academic integrity in hybrid courses. It must be clearly understood that acts of plagiarism or any other form of cheating or dishonesty will not be tolerated. Anyone committing such acts shall be subject to failure of this course and other disciplinary measures.

No assignment may be completed with the help of another student or faculty person unless specifically authorized by the Instructor. Use of your class notes and graded assignments, Blackboard reading and viewing materials, and online course materials recommended by the Instructor is allowed for testing purposes.

G. Course Materials/Textbook:

1. Beyer and Hanfit, Wills, Trusts, and Estates for Legal Assistants (2ed., Aspen 2007) ISBN# 073555840
2. Reading and viewing materials as posted on Blackboard; and information found on various websites as follows:

Kentucky statutes: www.lrc.ky.gov

Kentucky cases, Rules of Court: www.courts.ky.gov

Kentucky Revenue Cabinet: www.revenue.ky.gov

Kentucky Secretary of State: www.sos.ky.gov

Internal Revenue Service: www.irs.gov

IMPORTANT STUDENT INFORMATION:

All WKU students may access information relating to the Americans with Disabilities Act classroom/course accommodation requirements, Title IX sexual assault reporting requirements, student complaints and grievances, active shooter preparedness, emergency preparedness, student legal services, counseling services and police services at:

<https://www.wku.edu/syllabusinfo/index.php>