

PLS 395
Estate Planning and Administration
Spring 2022/WEB

INSTRUCTOR: Julie Shadoan
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OFFICE HOURS: Virtually, as posted on BB or by appointment
(Zoom link for office hours only: <https://wku.zoom.us/j/8976429929>)

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 x .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. WKU Vaccine and Mask Policy/WKU Covid 19-Related Information:

All students are strongly encouraged to get the COVID-19 vaccine and booster. Out of respect for the health and safety of the WKU community and in adherence with CDC guidelines and practices of all public universities and colleges in Kentucky, the University requires that a cloth face covering (reusable or disposable) that covers both the nose and mouth must be worn at all times when in public areas within all buildings. Students must properly wear face coverings while in class regardless of the room size or the nature of the classroom activities. Students who fail to wear a face covering as required will be in violation of the WKU Student Code of Conduct and will be asked to comply or will face disciplinary action, including possible dismissal from the University. Accommodations can be requested in special cases through the Student Accessibility and Resource Center (SARC): 270-745-5004 (voice), 270-745-3030 (TTY), or 270-288-0597 (video).

All students must immediately report a positive Covid-19 test result or close contact with a person who has tested positive to the Covid-19 Assistance Line at 270-745-2019. The assistance line is available to answer questions regarding any Covid-19 related issue. This guidance is subject to change based on requirements set forth by public health agencies or the office of the governor. Please refer to the Healthy on the Hill website for the most current information. www.wku.edu/healthyonthehill.

D. ADA Accommodations:

In order for the Instructor to make appropriate classroom accommodations for Students with learning or other disabilities, it is requested that the Student contact the Student Accessibility Resource Center regarding his/her disability prior to the beginning of this semester at: <https://www.wku.edu/sarc/>.

E. 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 1/18/2022.

F. 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.

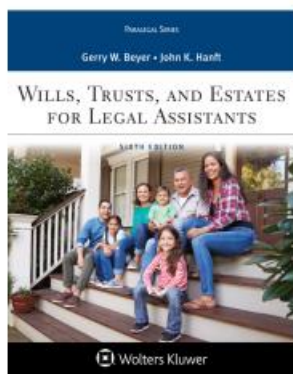
G. Honor Code:

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.

H. 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

I. Important Student Information:

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>

COURSE CALENDAR and TOPIC OUTLINE

WEEK	TOPIC	ASSIGNMENT
One (1/19)	Course Overview Blackboard Site Ethics in Estate/Probate Practice	Chapter 26 Discussion Board #1 (Introductory Post on Blackboard)
Two (1/26)	Intestate Succession Descent and Distribution	Chapters 1-4 Discussion Board #2
Three (2/2)	Powers of Attorney Blackboard	BB Posting Exercise #1
Four (2/9)		Exam #1
Five (2/16)	Living Wills Health Care Surrogates Blackboard	BB Posting Exercise #2
Six (2/23)	Non Probate Transfers	Chapters 13-17 Discussion Board #3
Seven (3/2)	Wills	Chapters 5, 6, 7, 9 Exercise #3
Eight (3/9)	Will Revocation Will Contest Actions	Chapters 8, 10, 11 Discussion Board #4
Nine (3/16)	Spring Break	No Assignment
Ten (3/23)		Exam #2
Eleven (3/30)	Dispensing with Estate Administration	Chapter 12
Twelve (4/6)	Estate Administration	Chapter 12 Exercise #4
Thirteen (4/13)	Tax Concerns	Chapter 24 Exercise (Extra Points)
Fourteen (4/20)	Trusts	Chapters 18-23 Exercise #5
Fifteen (4/27)	Elder Law	BB Posting Discussion Board 5
Sixteen (5/4)		Final Exam

NOTES:

- 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.
- This course outline is preliminary in nature and may be revised as the semester progresses. A current syllabus will always be available on Blackboard.