FLCC Course Syllabus

General Information

Date
12/01/2016

Department
Business

Course Prefix:
PLG

Course Number:
235

Course Title:
Administration of Wills, Trusts, and Estates

Course Information

Credit Hours
3

Lecture Contact Hours
3

Catalog Description
This course will introduce the student to laws relating to estate planning, the administration of estates (both testate and intestate), and the establishment and administration of trusts. Emphasis will be placed on the practicalities of estate law including interview techniques, preparation of wills, trusts and administrative documents, and filing requirements and procedures

Prerequisites
PLG 100 and PLG 125

Grading Scheme
Letter Grade

FLCC Values

College Learning Outcomes Addressed by the Course

Inquiry
Interconnectedness
Vitality
Perseverance

Course Learning Outcomes
Course Learning Outcomes

1: Describe the steps involved in will probate.
2: Explain the laws applicable to intestate succession and wills.
3: Explain the requirements for end of life care.
4: Prepare documents commonly used in estate planning and administration.

Program Affiliation

This course is required as a core program course in the following program(s)

AAS Paralegal
Paralegal Certificate

Outline of Topics Covered
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I. The Need for Wills & Trusts

II. The Relation between Property and Wills, Trusts & Estates

III. Death Intestate
   A. Terminology
   B. Intestate Succession Laws
   C. Inheritance Rights of Family Members

IV. Wills
   A. Requirements of a Valid Will
   B. Provisions in a Will – the Client's Interview
   C. Ademption
   D. Lapse
   E. Abatement
   F. Family Protections
   G. Revocation of a Will

V. Will Contests

VI. Non-testamentary Documents
   A. Power of Attorney
   B. Health Care Proxy
   C. Other End of Life Issues

XV. Trusts
   A. General Classification of Trusts
   B. Private and Public Express Trusts
   C. Active & Passive Trusts
   D. Inter Vivos and Testamentary Trusts
   E. Resulting Implied Trusts
   F. Constructive Implied Trusts
   G. Miscellaneous Trusts

XVI. Estate Planning
   A. Formulating the Estate Plan
   B. Tax Saving Devices

XVI. Probate / Estate Administration
   A. Pre-probate Issues
   B. Petition for Probate
   C. Distribution of the Estate & Payment of Claims
   D. Final Accounting & Closing of the Estate
   E. Informal Probate

XVII. Tax Considerations
   A. New York State Tax Returns
   B. Federal Tax Returns