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.

EXPECTATIONS: This is an accelerated course. You will be expected to spend an average of at least 8 hours per week reading and completing assignments. Please note that, barring extenuating circumstances, extensions will not be granted for this online course. This course is the equivalent of at least 50 clock hours of study. 70% is the minimum passing score on all tests and assignments for this course.

OBJECTIVES: Upon completion of this course, students will:

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

REQUIRED TEXT: The required text for this course is *Introduction to Estate Planning in a Nutshell*, most recent edition, West Publishing Company, 1992, ISBN #0-314-15306-3, and may be purchased from The Center for Legal Studies. Call 1-800-522-7737 or visit our store on this site to order.

HIGHLY RECOMMENDED LEGAL RESOURCES:


COURSE OUTLINE: Students will read the course textbook in its entirety quickly during the first week of the course to obtain an overview of estate planning. Afterwards, read each chapter more carefully while taking notes regarding important terms and concepts.

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: The first three tests should be turned in after the second week and the final two tests by the last week of the course. Tests are worth 50 points each.
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 25% of your grade.
- The five tests are worth 100 points and comprise 50% of your grade.
- Your participation in class participation assignments comprises 25% of your grade.