

PALE 400 : Estate Planning and Probate

A study of the various devices used to plan an estate, including wills, trusts, joint ownership, and insurance governing the disposition of property upon death. The course considers multiple plans in light of family situations and estate objectives. Other topics explored in the study include principles of law governing other legal issues associated with aging, death, and dying. The focus will be given to practices involving the administration of an estate, including taxes and preparation of forms.

Credits 3

CIP Code

22.0302

Prerequisite Courses

LIBR 150

Course Outcomes

After successfully completing the course, the learner will be able to:

1. Analyze estate planning facts, rules, laws, and cases and describe the remedies in specific cases.
2. Apply cases and laws to specific sets of factual information and distinguish between fact and opinion.
3. Compute intestate and elective shares, family allowances, probate, and estate taxes.
4. Describe the paralegal's role in the specialized law office, which concentrates on estate planning, wills, trusts, and probate procedure.
5. Describe the process of administering a decedent's estate.
6. Evaluate common estate planning tools, including wills, trusts, life insurance, joint tenancy with survivorship, and advance health care directives.
7. Explain the roles, responsibilities, and ethical standards governing paralegals and attorneys involved in the planning and administration of wills, trusts, and estates.
8. Identify and formulate problems, and propose and evaluate solutions to estate planning and related questions.
9. Understanding the law governing property transfers upon death and the procedures used to administer a decedent's estate.
10. Distinction between powers of attorney and conservatorship/guardianship proceedings.