

COURSE SYLLABUS

LGL 225 - ESTATE PLANNING AND PROBATE

Spring 2023

This syllabus is a guideline. The instructor reserves the right to make changes as necessary and appropriate to accomplish course goals and objectives.

Note: Changes will be disseminated in class and via Canvas

Instructor: Cecilia Galloway

Location: Real-Time Live via ZOOM class Thursday, 6:30 p.m. – 8:30 p.m.
Plus Hybrid and Homework Online (our CANVAS Classroom)*

Reliable Internet access and Zoom-capable device are required. **Student cameras ON during class**

Credits: 3.0

E-mail: CGalloway@nvcc.edu – PREFERRED CONTACT METHOD: please include LGL225 in subject line; I generally check e-mail daily Monday-Friday. Responses are usually made within 24-48 hours.

Instructor availability: Available in Zoom Office Hours Thursday, 5 p.m. – 6 p.m. by appointment. Arrange in advance. Other individual appointments by request. Send request by e-mail or see me in class. Post Questions on ASK MY PROFESSOR Discussion Board Forum too. Any exceptions to this schedule will post on Canvas in Announcements section. At a minimum, E-mails and/or telephone responses will be made every Monday and Thursday during the semester (except Holidays).

Information in this Document is available in our Canvas Classroom. Many resources are accessible by links posted on our Canvas site or the main NVCC website.

Class meeting day/times: This is a Hybrid Course. Thursday, 6:30 p.m. – 8:30 p.m., Face-to-Face via Zoom Class Session including Lecture and exercises. Online component and Homework assignments weekly. Deviations from this schedule shall be posted on Canvas in advance and announced in class and/or by Announcement email.

Required Text: ***Wills, Trusts, and Estates for Legal Assistants, Sixth Edition* by Gerry W. Beyer and John Hanft.**

ISBN: Paperback: 9781543813081; ISBN eBook: 9781543815108

There will be substantial required reading from the book and many hybrid and homework assignments will be based on the content in the book.

Student Resources/Support: Supplemental resources and lecture slides will be available in Canvas to help you study and complete your tasks. Handouts may be distributed via email or posted in Canvas classroom. If you think of other helpful tools, please let me know. Please contact the IT Help Desk in the event that you require technical support. Direct assignment-specific questions to me.

General Course Purpose: This course is designed to give the student an understanding of the law governing transfers of property during life and upon death and of the procedures used to administer a decedent's estate, both probate and on-probate.

Entry Level Competencies: College Composition; Legal 110 completed or concurrent registration.

Preferred Prerequisites: Legal Research and Writing, Legal 125 and Legal 126

Course Description: Introduces various devices used to plan an estate, including wills, trusts, joint ownership, gifts and insurance, life-care planning, and estate administration. Considers various plans in light of family situations and estate objectives. Major practical experiences focus on Will drafting, simple testamentary trust draft, administration of an estate and drafting of two advance directives. Lecture generally 1.5 - 2 hours per week, with 1 – 1.5 hours hybrid portion off-campus and online, plus homework and projects. Some weeks will include shorter lecture time and longer hybrid and/or homework sessions.

COURSE OBJECTIVES: Upon completion of this course, the student should be able to:

- understand the basic ways of passing property upon death
- understand the law governing wills, trusts and estates
- understand the law governing non-probate transfers
- understand the processes of informal and formal estate administration
- recognize and use the forms typically used in the processes of estate planning and estate administration
- assist a lawyer in every stage of estate planning and administration

MAJOR TOPICS TO BE INCLUDED:

- property rights and death
- wills
- intestate succession
- testamentary and living trusts
- non-probate transfers of property
- federal, state and local estate and gift taxes

- estate planning
- formal and informal probate
- the duties of personal representatives
- administering an estate
- overview of life planning needs for potential incapacity
- personal choices in death and dying
- living wills and natural death statutes
- anatomical gifts
- durable powers of attorney
- advance health care directives

Course Format: Lecture during weekly Zoom class meetings will cover chapter assignments and general topic with exercises to augment learning. Students must attend with **Camera On**. Most sessions will include review of prior week's chapter homework to reinforce learning. Students will read the assigned chapters in advance of each class. Much of our live meeting time will focus on enhancing your understanding and application to "real life" situations. Additionally, each week's online component and/or discussion questions and Homework assignments will be posted in Canvas. On average, Students should allocate an additional 3 to 4 hours per week outside of class attendance to complete the online component for each week, readings and homework assignments.

Course Requirements: Students are expected to prepare for each class by completing the reading before the scheduled lecture and exercise session. You are expected to attend class and complete online out-of-class portion of class work and homework assignments by the posted deadlines. All Online component assignments and Homework assignments will be posted in Canvas. Regular attendance is essential to your success. It is your responsibility to inform the instructor prior to an absence from class and you are responsible for making up all course work missed during an absence.

Grades: Maximum points available – 690 Points (plus extra credit opportunities)

Attendance: Live class Lectures via Zoom: **70** points possible:

Hybrid and Homework graded assignments: **70** points possible (5 point and 10 point assignments)

Progress quiz/exams:

Mid-Term: **50** points possible: mixed exam including T/F, multiple choice, short answer, and intestacy problem

Final Exam: **100** points possible: Fact patterns with multiple questions pertaining to estate planning and/or administration and additional other questions

Will: 100 points

Testamentary Trust: 75 points (add it to your Will)

Estate Administration Project: 175 points – Given a Client scenario, you will perform the tasks of estate administration using probate estate forms for Virginia and inventory and accounting per Virginia requirements and forms. Your project pack will include all basic info you need to conduct the administration.

General Durable Power of Attorney: 25 points

Advance Medical Directive: 25 points

Course grades will be based on the total number of points earned by each student. Letter grades will then be assigned using the following **percentage scale**: 90-100—A (or more points required for A grade); 80-89—B; 70-79—C; 60-69-D; Below 60—F.

Important Dates: 15-week Session	
Dr. Martin Luther King Day; College Closed	January 16
Classes Begin	January 17
Students may add or drop courses through NOVAConnect	January 17-23
Last day to drop with tuition refund or change to audit (Census Date)	February 2
Parking enforcement on Student B Lots begins	February 3
Last day to apply for spring graduation	March 1
Spring Break (Classes do not meet)	March 13-19
Last day to withdraw without grade penalty	March 25
Final Exams End	May 8

OTHER POLICIES AND PROCEDURES:

***If college is closed for emergencies that affect our class meeting or if I must cancel class, announcements and information concerning assignments will be posted on Canvas and e-mailed to students.**

Canvas: You will be held responsible for all information posted on Canvas. This includes, but is not limited to, announcements, assignments, contents of syllabus

Academic Honesty Policy: Academic dishonesty includes cheating, plagiarism, and other forms of dishonorable conduct (<https://www.nvcc.edu/students/handbook/index.html>.) Such dishonesty will not be tolerated. Penalties can range from the issuance of failing grades (on an assignment, an exam, the course) to being referred to the Dean of Student Development for further disciplinary action, including possible expulsion from the College. Legal writing assignments often include verbatim quotations and statutory language. **Proper use of citations and quotation cites will ensure you have not inadvertently plagiarized from a case or statute.**

Special Needs/Disabilities Accommodations: Please address any special problems or needs at the beginning of the semester with me. If you are seeking accommodations based on a disability, you should provide a disability data sheet, which can be obtained from the counselor for special needs. See <https://www.nvcc.edu/support/>

Cell Phone Policy: As a courtesy to the instructor and your fellow students, please turn ringer off for the time we are in class. Do not send (or read) text messages during class.

E-mail, online and communication etiquette: Always keep communications respectful whether they are directed to the professor or fellow students or administrative staff. Include your name and return e-mail address in all e-mails. Do not send new communications as replies to my e-mails or they may not reach me.

Makeup and late work: Any delays in submitting assignments for grades beyond the original due date **will result in loss of points unless specifically authorized in advance for good cause** shown. Any assignment submitted more than 5 days after its original due date or pre-approved alternate due date cannot be accepted and will receive a grade of "0".

LINKS TO STUDENT TECHNOLOGY AND ACADEMIC RESOURCES:

<https://www.nvcc.edu/cetss/continuity/index.html>

Minimum Technical Requirements: Access to a computer and reliable Internet connection is required. Canvas tutorials are available at: <https://www.nvcc.edu/canvas/> ([Links to an external site.](#)). Contact the IT Help Desk (703 426-4141) for technical support.

Canvas Help: <https://www.nvcc.edu/canvas/index.html> ([Links to an external site.](#))

The Writing Assistance Center provides students with effective reading, writing, and critical thinking strategies. Additional information can be found at: <https://blogs.nvcc.edu/asc/writing-center/> ([Links to an external site.](#)).

Remote Student Services: <https://www.nvcc.edu/safe-campus/services/index.html>