

CUMBERLAND COUNTY COLLEGE

Course: PL 206: Administration of Estates

Credits: 3

Prerequisites: PL 101: Introduction to the Legal System

Description: This course provides a study of the disposition of property through the preparation and execution of will, trusts, and estates; focusing on will drafting, probate, administration and state and federal tax implications.

Learning Outcomes:

At the completion of this course, students will be able to:

- Acquire the basic familiarity with the contents of wills
- Prepare, under supervision of counsel, wills and trusts
- Prepare for Probate and assist in the securing of letters of Testamentary and Letters of Administration
- Be familiar with estate taxes, including bring able to assist in the preparation of a New Jersey inheritance Tax Return and a Federal Estate Tax return
- Materially assist in the administration of an estate, including securing appraisals, handling claims and effectuating the bequests.

Topical Outline

- The Estate Plan and the Purpose and Need for a Will
- The Concept of Property Related to Wills, Trusts, and Estate Administration
- The Participants and the Proper Court
- The Law of Succession: Death Testate or Intestate
- Wills: Validity Requirements, Modification, Revocation and Contests
- Preparation to Draft a Will: Checklists and the Conference with a Client
- Final Draft and Execution of a Valid Will
- Introduction to Trusts
- Classification of Trusts, The Living Trust, and Other Special Trusts
- Estate Planning
- Long-Term Care
- Personal Representatives: Types, Pre-Probate Duties, and Appointment
- Probate and Estate Administration
- Informal Probate Administration
- Tax Considerations in the Administration of Estates
- Ethical Principles Relevant to Practicing Paralegals

Text: Hower, Dennis, R. & Kahn, Peter (2012). *Wills, Trusts, and Estate Administration*.

(7th ed.). Delamar Cengage Learning: NY.

Student Assessment: Assessment may be accomplished through projects, portfolios, exams, presentations and/or papers.

Academic Integrity: Plagiarism is cheating. Plagiarism is presenting in written work, in public speaking, and in oral reports the ideas or exact words of someone else without proper documentation. Whether the act of plagiarism is deliberate or accidental [ignorance of the proper rules for handling material is no excuse], plagiarism is, indeed, a “criminal” offense. As such, a plagiarized paper or report automatically receives a grade of **ZERO** and the student may receive a grade of **F** for the semester at the discretion of the instructor.

Tutoring & Project Assist

If you are having difficulty with work in this class tutoring is available through the Center for Academic & Student Success. If you think that you might have a learning disability, contact Project Assist at 856.691.8600 x 1282 for information on assistance that can be provided to eligible students.

Before Withdrawing From This Course

If a student experiences adverse circumstances while enrolled in this course and considers withdrawing, s/he should see an advisor (division or advisement center) **BEFORE** withdrawing from the class. A withdrawal may cause harmful repercussions to completion rate standards and overall GPA which can limit or eliminate future financial aid in addition to causing academic suspension.