



INSTRUCTIONAL PACKAGE

LEG 233

Wills, Trusts and Probate

2018-2019

Fall 2018

INSTRUCTIONAL PACKAGE

PART I: COURSE INFORMATION

EFFECTIVE TERM: 2017 - 2018 (Fall 2017)

COURSE PREFIX: LEG 233

CONTACT HOURS: 3.0

COURSE TITLE: Wills, Trust & Probate

CREDIT HOURS: 3.0

RATIONALE FOR THE COURSE: To familiarize the paralegal student with the concepts and forms necessary for drafting wills, trusts, and the probate administration process in South Carolina.

COURSE DESCRIPTION: This course includes a detailed study of testacy and intestacy, preparation of wills and codicils, and fundamentals of trust and probate administration.

PREREQUISITE: (COMPASS Writing 78 and COMPASS Reading 85) or (ACCUPLACER Reading Comp 075 and ACCUPLACER Sentence Skills 081) or (New ACCUPLACER Reading Comp 250 and New ACCUPLACER Sentence Skills 250) or (COMPANION Reading 075 and COMPANION Sentence Skills 081) or (Multiple Measures English 1) or (ACT Reading 19 and ACT English 19) or SAT Critical Reading 480 or (Credit level [ENG 100](#) Minimum Grade of C* or Credit level [ENG 101](#) Minimum Grade of C or Credit level [ENG 101](#) Minimum Grade of TC)

REQUIRED MATERIAL: Hower, Walter and Wright, Wills, Trusts, and Estate Administration (8th Edition) (2017) Cengage Learning.

Please visit the Bookstore online site for the most current textbook information. Use the direct link below to find textbooks.

[BOOKSTORE.](#)

Enter the semester, course prefix, number and section and it will take you to the correct textbook.

TECHNICAL REQUIREMENTS:

Access to Desire2Learn (D2L), HGTC's student portal for course materials.
WaveNet and D2L email access.

CLASSROOM ETIQUETTE:

Please refer to your Instructor's Course Information Sheet for specific information.

PART II: STUDENT LEARNING OUTCOMES

COURSE LEARNING OUTCOMES and ASSESSMENTS*:

Upon completion of this course, students will be able to:

MODULE #1

Material Covered:

Chapter 1: Property related to Wills, Trusts and Estates
Chapter 2: Estate Plans and Need for Wills

***Assessments:** Assignment
Test 1

Learning Outcomes: Explain the various types of property and forms of ownership.
Discuss the purpose of an estate plan and the associated documents to accomplish a plan.
Explain the function and purpose of a will and related terminology.

MODULE #2

Material Covered: Chapter 3: The Law of Succession; Testacy and Intestacy

***Assessment:** Assignment
Test 2

Learning Outcomes: Explain the impact on property of death with and without a will.
Identify the parties and types of gifts contained in a will.
Discuss the distribution of estate assets under SC intestacy law.

MODULE #3

Material Covered: Chapter 4: Requirements for a Will
Chapter 5: Preparation for Drafting Wills
Chapter 6: Final Will and Execution

***Assessments:** Checklist Assignment
Draft Will

Learning Outcomes: Identify formal requirements for a valid will.
Explain the legal requirements to modify and revoke a will.
Explain the process for proper execution of a will.
Prepare a checklist for gathering facts to prepare will.
Conduct a "Client" interview.
Draft a preliminary will based on the "Client" interview.

MODULE # 4

Material Covered: Chapter 7: Probate Courts
Chapter 8: Personal Representatives

***Assessments:** Assignment
Test 3

Learning Outcomes: Discuss the participants involved in drafting and administering the will and estate administration and their functions.
Identify the proper court and jurisdiction to supervise the administration of a probate estate.
Explain the duties of a personal representative and his/her attorney and paralegal in the administration process.

MODULE # 5

Material Covered: Chapter 9: Estate Administration
Chapter 10: Informal Probate Administration

***Assessments:** Probate Administration Project

Learning Outcomes: Identify the distinction between formal and informal probate proceedings.
Discuss the paralegal’s role in communication with the personal representative and probate court in administering an estate in SC.
Prepare the paperwork for the administration of an informal estate administration.

MODULE # 6

Material Covered: Chapter 12: Introduction to Trusts
Chapter 13: Types of Trusts

***Assessments:** Test 4

Learning Outcomes: Identify and define the terminology of trusts and the purposes of trusts.
Explain the participants in the creation and operation of trusts.
Discuss the uses and functions of various types of trusts.

*** Students – please refer to the Instructor’s Course Information Sheet for specific information on assessments and due dates.**

PART III: GRADING AND ASSESSMENT

EVALUATION OF REQUIRED COURSE MEASURES/ARTIFACTS*

Students’ performance will be assessed and the weight associated with the various measures/artifacts are listed below.

EVALUATION*

TESTS -----	40%
ASSIGNMENTS -----	15%
CLIENT INTERVIEW-----	10%
WILL EXERCISE-----	10%
ESTATE ADMINISTRATION PROJECT-----	20%
PREPARATION AND PARTICIPATION-----	05%
TOTAL	100%

***Students, for the specific number and type of evaluations, please refer to the Instructor’s Course Information Sheet.**

COURSE GRADING SYSTEM:

100% - 90%	A
89% - 80%	B
79% - 70%	C
69% - 60%	D
59% & Below	F

I Course requirements incomplete. Must be completed by deadline given by Instructor or "I" converts to an F.

Grades earned in courses impact academic progression and financial aid status. Before withdrawing from a course, be sure to talk with your instructor and financial aid counselor about the implications of that course of action. Ds, Fs, Ws, WFs and Is also negatively impact academic progression and financial aid status.

The Add/Drop Period is the first 5 days of the semester for **full term** classes. Add/Drop periods are shorter for accelerated format courses. Please refer to the academic calendar for deadlines for add/drop ([ACADEMIC CALENDAR](#)). You must attend at least one meeting of all of your classes during that period. If you do not, you will be dropped from the course(s) and your Financial Aid will be reduced accordingly.

PART IV: ATTENDANCE

Horry-Georgetown Technical College maintains a general attendance policy requiring students to be present for a minimum of eighty percent (80%) of his or her classes in order to be eligible to receive credit for any course. However, due to the varied nature of courses taught at the College, a more rigid attendance policy may be required by individual instructors. At a minimum, a student may be withdrawn from a course(s) after he or she has been absent in excess of ten percent (10%) of the total contact hours for a course. **Instructors define absentee limits for their class at the beginning of each term; please refer to the Instructor Course Information Sheet.**

For online and hybrid courses, check your Instructor's Course Information Sheet for any required on-site meeting times. Please note, instructors may require tests to be taken at approved testing sites, if you use a testing center other than those provided by HGTC, the center may charge a fee for its services.

Part V: Student Resources

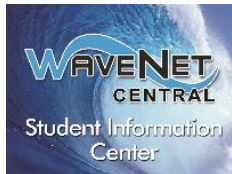


The Student Success and Tutoring Center (SSTC)

The SSTC offers to all students the following **free** resources:

1. **Academic coaches** for most subject areas, **Writing Center Support**, and **college success skills**.
2. **On-line student success and academic support resources**.

Visit the SSTC website: [Student Success & Tutoring Center](#) and visit the student services tab in your WaveNet account to schedule appointments using TutorTrac. For more information, call: SSTC Conway, 349-7872; SSTC Grand Strand, 477-2113; and SSTC Georgetown, 520-1455. Room locations and Live Chat is available on the SSTC website.



Student Information Center: WaveNet Central (WNC)

WNC offers to all students the following **free** resources:

1. **Getting around HGTC:** General information and guidance for enrollment!
2. Use the [Online Resource Center \(ORC\)](#) for COMPASS support, technology education, and online tools.
3. **Drop-in technology support or scheduled training** in the Center or in class.
4. **In-person workshops, online tutorials and more services** are available.

Visit the WNC website: [Wavenet Central](#). Live Chat and Center locations are posted on the website. Or please call one of the following locations: WNC Conway, 349-5182; WNC Grand Strand, 477-2076; and WNC Georgetown, 520-1473.

Student Testing:

Testing in an **online/hybrid** course may be accomplished in a variety of ways:

- Test administered within D2L
- Test administered in writing on paper
- Test administered through Publisher Platforms

Further more tests may have time limits and/or require a proctor.

Proctoring can be accomplished either face-to-face at an approved site or online through RPNOW, our online proctoring service. To find out more about proctoring services, please visit the [Online Testing](#) section of the HGTC's Testing Center webpage.

The **Instructor Information Sheet** will have more details on test requirements for your course.

Disability Services:

HGTC is committed to providing an accessible environment for students with disabilities. Inquiries may be directed to Jocelyn Williams, Director of Student Development on the Conway Campus Jaime Davis, Counselor/Advisor on the Georgetown Campus or Kristin Griffin, Counselor on the Grand Strand Campus. These individuals will review documentation of the student's disability and, in a confidential setting with the student, develop an educational accommodation plan.

Note: It is the student's responsibility to self-identify as needing accommodations and to provide acceptable documentation. After a student has self-identified and submitted documentation of a disability, accommodations may be determined, accepted, and provided.

Statement of Equal Opportunity/Non-Discrimination Statement

Horry Georgetown Technical College prohibits discrimination and harassment, including sexual harassment and abuse, on the basis of race, color, gender, national or ethnic origin, age, religion, disability, marital status, veteran status, sexual orientation, gender identity, or pregnancy in educational programs and/or activities.

Title IX Requirements

Horry Georgetown Technical College prohibits the offenses of domestic violence, dating violence, sexual assault, and stalking. Any student who believe he or she has experienced or witnessed discrimination including sexual harassment, domestic violence, dating violence, sexual assault or stalking is encouraged to report such incidents to one of the College's Title IX Coordinators.

*Faculty and Staff are required to report incidents to the Title IX Coordinators when involving students. The only HGTC employees exempt from mandatory reporting are licensed mental health professionals (only as part of their job description such as counseling services).

Inquiries regarding the non-discrimination policies:	
Student and prospective student inquiries concerning Section 504, Title II, and Title IX and their application to the College or any student decision may be directed to the Associate Vice President for Student Affairs.	Employee and applicant inquiries concerning Section 504, Title II, and Title IX and their application to the College may be directed to the Associate Vice President for Human Resources.
Dr. Melissa Batten, AVP Student Affairs <i>Title IX Coordinator</i> Building 1100, Room 107A, Conway Campus PO Box 261966, Conway, SC 29528-6066 843-349-5228 Melissa.Batten@hgtc.edu	Jacquelyne Snyder, AVP Human Resources <i>Section 504, Title II, and Title IX Coordinator</i> Building 200, Room 212A, Conway Campus PO Box 261966, Conway, SC 29528-6066 843-349-5212 Jacquelyne.Snyder@hgtc.edu