



# INSTRUCTIONAL PACKAGE

Leg 233

Wills, Trust & Probate

2019 – 2020

Fall/2019

# INSTRUCTIONAL PACKAGE

## PART I: COURSE INFORMATION

EFFECTIVE TERM: 2019 - 2020

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 trusts and probate administration.

**PREREQUISITE: 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:

#### Course Materials:

The materials required for this course are included in [Cengage Unlimited](#), a subscription that gives you access to **all your Cengage access codes and online textbooks** for \$119.99 a semester, \$179.99 for a year or \$240 for two years. No matter how many Cengage products you use, and for any class you are using them in, they are included in Cengage Unlimited, and the price stays the same. You can purchase access to Cengage Unlimited in the bookstore, or at [cengage.com](#). **NOTE: You only purchase Cengage Unlimited ONE TIME from the bookstore. This one purchase covers ALL the LEG course materials and any other course using Cengage materials.**

This course will require the **MindTap for Hower/Walter – Wills, Trusts, and Estate Administration 8<sup>th</sup> edition** from Cengage. The **MindTap and Premium Website** is available through [Cengage Unlimited](#), your subscription. MindTap is a courseware that provides you direct access to the eBook, study materials, and additional assignments/activities for class.

**You can access Cengage Unlimited through your Cengage account:**  
<https://login.cengage.com>

With Cengage Unlimited and the use of MindTap, you also get the option to rent the physical textbook for \$7.99 through your subscription

**You can purchase access to Cengage Unlimited in the bookstore or at [cengage.com](#).**

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

[BOOKSTORE](#).

Enter the semester, course prefix, number and section when prompted and you will be linked 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.

As a matter of courtesy to other students and your professor, please turn off cell phones and other communication/entertainment devices before class begins. If you are monitoring for an emergency, please notify your professor prior to class and switch cell phone ringers to vibrate.

## **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  
Assignment

\*Assessments:

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  
Probate Administration Project

\*Assessments:

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:

Learning Outcomes:

Test 3  
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	30%
ASSIGNMENTS	25%
CLIENT INTERVIEW	5%
WILL EXERCISE	15%
ESTATE ADMINISTRATION PROJECT	20%
PREPARATION AND PARTICIPATION	5%
TOTAL	100%

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

## 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 80 percent (80%) of their classes in order to receive credit for any course. Due to the varied nature of courses taught at the college, some faculty may require up to 90 percent (90%) attendance. Pursuant to 34 Code of Federal Regulations 228.22 - Return to Title IV Funds, once a student has missed over 20% of the course or has missed two (2) consecutive weeks, the faculty is obligated to withdraw the student and a student may not be permitted to reenroll. **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.

### **Attendance for Face-to-Face Courses:**

For a 14 week course (fall and spring) the allowed number of absences for a MW or TR class is as follows: 5 absences are allowed regardless of reason. After the allowed number of misses, the student will be dropped from the course with a W or a WF.

For a 10 week course (summer) the allowed number of absences for courses meeting twice a week is 4 absences. After missing the maximum number of allowed absences a student will be dropped from the course with a W or a WF.

### **Online/Hybrid Attendance:**

Students enrolled in distance learning courses (hybrid and online) are required to participate weekly in an Attendance Discussion Board or submit an assignment in order to demonstrate course participation. Students showing no activity in the course for two weeks will be withdrawn due to lack of attendance.

## **Part V: Student Resources**

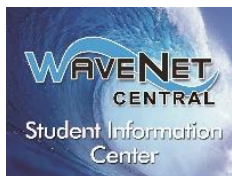


### **The Student Success and Tutoring Center (SSTC)**

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 or go to the [Online Resource Center](#) to access on-demand resources any time.



## **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.

## **Disability Services:**

HGTC is committed to providing an accessible environment for students with disabilities. Inquiries may be directed to Beth Havens, 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, sex, national or ethnic origin, age, religion, disability, marital or family status, veteran status, political ideas, sexual orientation, gender identity, or pregnancy, childbirth, or related medical conditions, including, but not limited to, lactation in educational programs and/or activities.

Inquiries regarding the non-discrimination policies: Students 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 Vice President for Student Affairs, Dr. Melissa Batten, VP Student Affairs, Title IX Coordinator, Building 1100, Room 107A, Conway Campus, PO Box 261966, Conway, SC 29528-6066, 843-349-5228, [Melissa.Batten@hgtc.edu](mailto:Melissa.Batten@hgtc.edu). Employee and applicant inquiries concerning Section 504, Title II, and Title IX and their application to the College may be directed to the Vice President for Human Resources, Jacquelyne Snyder, VP Human Resources, Section 504, Title II, and Title IX Coordinator, Building 200, Room 212A, Conway Campus, PO Box 261966, Conway, SC 29528-6066, 843-349-5212, [Jacquelyne.Snyder@hgtc.edu](mailto:Jacquelyne.Snyder@hgtc.edu).

## ***Title IX Requirements***

All students (as well as other persons) at Horry-Georgetown Technical College are protected by Title IX—regardless of their sex, sexual orientation, gender identity, part- or full-time status, disability, race, or national origin—in all aspects of educational programs and activities. Any student, or other member of the college community, who believes that he/she is or has been a victim of sexual harassment or sexual violence may file a report with the college’s Chief Student Services Officer, campus law enforcement, or with the college’s Title IX Coordinator, or designee.

\*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).

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