



INSTRUCTIONAL PACKAGE

Leg 233
Wills, Trust & Probate

Effective Term
Fall 2023/Spring 2024/Summer 2024

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Part I: Course Information

Effective Term: Fall 2023/Spring 2024/Summer 2024

COURSE PREFIX: LEG 233

COURSE TITLE: Wills, Trust & Probate

CONTACT HOURS: 3.0

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. (Legal Specialty)

PREREQUISITES/CO-REQUISITES:

Reading/Writing Scores: MM1-1; A03-19; A01-19; S01-480; WS1L-1; WS1-1 or ENG 101-C; Eng 101-TC.

***Online/Hybrid** courses require students to complete the [DLi Orientation Video](#) prior to enrolling in an online course.

REQUIRED MATERIALS:

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 \$124.99 a semester, \$189.99 for a year, or \$249.99 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 non-LEG course using Cengage materials.**

This course will require the **MindTap for Hower/Walter – Wills, Trusts, and Estate Administration 8th 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 purchase access to Cengage Unlimited at [cengage.com](#).

Or

Please visit the [BOOKSTORE](#) online site for most current textbook information.

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 learning management system (LMS) used for course materials.

Access to myHGTC portal for student self-services.

College email access – this is the college's primary official form of communication.

STUDENT IDENTIFICATION VERIFICATION:

Students enrolled in online courses will be required to participate in a minimum of one (1) proctored assignment and/or one (1) virtual event to support student identification verification. Please refer to your Instructor Information Sheet for information regarding this requirement.

CLASSROOM ETIQUETTE:

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.

NETIQUETTE: is the term commonly used to refer to conventions adopted by Internet users on the web, mailing lists, public forums, and in live chat focused on online communications etiquette. For more information regarding Netiquette expectations for distance learning courses, please visit [Online Netiquette](#).

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
Test 3

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

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	22.50%
Assignments	30.00%
Client Interview	7.50%
Will Exercise	20.00%
<u>Estate Administration Project</u>	<u>20.00%</u>
	100%

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

GRADING SYSTEM:

Please note the College adheres to a 10 point grading scale A = 100 – 90, B = 89- 80, C = 79 – 70, D = 69 – 60, F = 59 and below. 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. 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, and 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 tutors** for most subject areas, **Writing Center support**, and **college success skills**.
2. Online **tutoring** and academic support resources.
3. Professional and interpersonal communication **coaching** in the EPIC Labs.

Visit the [Student Success & Tutoring Center](#) website for more information. To schedule tutoring, contact the SSTC at sstc@hgtc.edu or self-schedule in the Penji iOS/Android app or at www.penjiapp.com. Email sstc@hgtc.edu or 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.



STUDENT INFORMATION CENTER: TECH Central

TECH Central offers to all students the following free resources:

1. **Getting around HGTC:** General information and guidance for enrollment, financial aid, registration, and payment plan support!
2. Use the [Online Resource Center \(ORC\)](#) including Office 365 support, password resets, and username information.
3. **In-person workshops, online tutorials and more services** are available in Desire2Learn, Student Portal, Degree Works, and Office 365.
4. **Chat with our staff on TECH Talk**, our live chat service. TECH Talk can be accessed on the student portal and on TECH Central's website, or by texting questions to (843) 375-8552.

Visit the [Tech Central](#) website for more information. Live Chat and Center locations are posted on the website. Or please call (843) 349 – TECH (8324), Option #1.



HGTC LIBRARY:

Each campus location has a library where HGTC students, faculty, and staff may check out materials with their HGTC ID. All three HGTC campus libraries are equipped with computers to support academic research and related school work; printing is available as well. Visit the [Library](#) website for more information or call (843) 349-5268.

STUDENT TESTING:

Testing in an **online/hybrid** course and in **make-up exam** situations may be accomplished in a variety of ways:

- Test administered within D2L
- Test administered in writing on paper
- Test administered through Publisher Platforms (which may have a fee associated with the usage)

Furthermore, 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 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 HGTC's [Accessibility and Disability Service webpage](#). The Accessibility and Disability staff 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.

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).

INQUIRIES REGARDING THE NON-DISCRIMINATION/TITLE IX POLICIES:

Student and prospective student inquiries concerning Section 504, Title II, Title VII, 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, Section 504, and Title II Coordinator

Building 1100, Room 107A, Conway Campus

PO Box 261966, Conway, SC 29528-6066

843-349-5228

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

Affirmative Action/Equal Opportunity Officer and Title IX Coordinator

Building 200, Room 205B, Conway Campus

PO Box 261966, Conway, SC 29528-6066

843-349-5212

Jacquelyne.Snyder@hgtc.edu