



**CLASS NUMBER AND NAME:** LGN231F ESTATE PLANNING/PROBATE

**TOTAL CLOCK HOURS/UNITS:** 24 Hours/2 Units

**PREREQUISITES:** Completion of CMN144B-Intermediate Word and completion or concurrent enrollment in LGN130B-Business Law II.

**TEXT AND MATERIALS:** *Family Law and Estate Planning/Probate*. Empire College Custom Textbook. William Statsky/Nancy Gallo, Delmar Cengage; (ISBN 9781133442486)

*Black's Law Dictionary* 4<sup>th</sup> Ed. Brian A. Garner. West Publishing Company. 2011. (ISBN 9780314275448)

Recommended: Yellow legal pads, flash cards, blue pens

**CLASS DESCRIPTION:** This class is the second of two sections (LGN231E & F) that focuses on the role of legal support in family and estate planning/probate law offices. This course provides provisions and techniques for drafting wills, trusts, and advance healthcare directives in estate planning/probate. The processes of estate administration and the probate practice are studied in detail. The student is exposed to the processes in the calculation and closing of an estate.

**CLASS OBJECTIVES:** To provide students with the knowledge of basic skills and procedures specifically related to the area of family law and estate planning/probate. This class is part of a series that will prepare students to assume a position as a member of a legal support staff in a multitude of law offices.

**REQUIREMENTS:** This is an approximate schedule and is subject to change at the instructor's discretion. The student is responsible for any missed information and handouts due to absences. Homework includes familiarizing yourself to the Calendar and Syllabus, textbook reading assignments, and study guide homework plus diagrams, flashcards, and practice tests all when appropriate to augment learning. The time spent in preparation for or reflection on course lecture will approximate two hours outside of class for each lecture credit hour utilized by the instructor in delivery of the materials and ¼ hour outside of class for each hour of structured lab time.

**CLASS FORMAT OVERVIEW:** Class time will be spent in lectures given by the instructor, and by student participation in individual projects assisted by the instructor.

**ATTENDANCE** It is critical to the student's success to attend class every day. The student's presence for the entire hour is an important demonstration of the concept of professional demeanor and shows respect for the class. Therefore, students will only be marked present when they arrive on time and remain for the entire class session. A student must be present for 80 percent of the class, or she or he will be asked to leave the class and will receive a failing grade in the class. **Please refer to the attendance contract signed at the beginning of the Civil Litigation series. The attendance penalty will be deducted from the student's final grade.**

**TESTING:** There will be a quiz every week except for the last week of the mod. The quizzes will include a legal terminology component. **There are no late quizzes or make-up quizzes.**

**GRADING POLICIES:** Students will be evaluated as follows:

Assignments

Each assignment has a value from 50 to 100 points. Please see grading rubric. The student will turn in first and final drafts of the assignments, on deadlines assigned by the instructor. The deadlines are final.

Legal Folders

Students are also required to submit a folder of all projects completed in proper format with an index and tabs of all legal pleadings. This folder is worth 100 points.

Final and Quizzes

Quizzes consist of 25 questions - 10 legal terminology, 15 multiple-choice, true/false, fill-in, worth 2 points each for a total of 50 points.

Course grades for each module will be based on the average of the scores received on tests, homework, attendance, and other course assignments. **No late homework assignments will be accepted by the instructor.** The attached course outline provides points available and homework policies.

Weighting of grades is as follows:

100% Homework, Quizzes, Final Exams or Written Papers (Points will be taken off for absences)

Combined grades from attendance, class participation, quizzes, final exams or written papers, as applicable, will be graded on the following scale:

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

**FINAL GRADE:**

The final grade will be an average of the scores of all the above work including quizzes, final exam, folders, and assignments.

**ANTICIPATED LEARNING OUTCOMES:**

Upon completion of this course the student will:

1. Be able to review document formatting requirements and legal procedures as set forth in Code of Civil Procedure, California Rules of Court, and Sonoma County Local Court Rules regarding family and estate planning/probate law to allow the student to independently prepare legal documents;
2. Be able to prepare pleadings (Judicial Council Forms) using Martin Dean's Essentials legal forms computer program, and be able to prepare pleadings as documents. Understand and apply formatting requirements and rules of legal procedure as set forth in Code of Civil Procedure, California Rules of Court, and Sonoma County Local Court rules regarding family law;
3. Understand the importance of calendaring documents to meet court deadlines;
4. Understand and correctly utilize legal terminology;
5. Understand the legal ethical principles that guide a paralegal, a law office administrator, and a legal secretary based on the Model Rules of Professional Conduct of the American Bar Association;
6. Understand filing systems as they relate to a law

office;

7. Understand the importance of effective proofreading.



**Probate/Estate Planning, LGN231F**  
**Course Schedule (Part 2)**  
**(Weeks 1 – 3 are LGN231E, Weeks 3 – 6 are LGN231F)**

Week of Mod	Reading/Assignments/Quiz
Four	<p><b>Begin Estate Planning on _____</b></p> <p><u>HW: Read</u> Chapter 1 – The Elder Law Practice, pp. 1-20 Chapter 2 – Life Planning: Drafting a Last Will and Testament, pp. 25-60</p> <p><u>Assignments</u></p> <ul style="list-style-type: none"><li>• Review Questions, p. 21, answered fully, memo form. Please repeat each question before answering fully in complete sentences (no bullet points, for instance, allowed).</li><li>• Review Questions, p. 62 questions 1-6, 9, 13, 14, 15</li><li>• Begin Small Estate Documents</li></ul> <p><b>FINALS DUE: _____</b></p>
Five-Six	<p><b>Estate Planning</b></p> <p><u>HW: Read</u> Chapter 3 – Life Planning: Advance Directives for Health Care, Euthanasia, and Physician-Assisted Suicide, pp. 65-91 Chapter 5 – Estate Planning: Trusts, pp. 130-153 Prepare <u>flashcards</u> for legal terminology for review and study for the quiz <u>Take notes</u> during lecture in order to review and study for the quiz</p> <p><u>Assignments</u></p> <ul style="list-style-type: none"><li>• Chapter 3 – Review Questions, 1-10, p. 92 (Short answers in complete sentences. Memo format.)</li><li>• Chapter 5 -- Review Questions, 1-12, p. 155 (Short answers in complete sentences.)</li><li>• Work on Small Estate Documents</li></ul> <p><b>FINALS DUE: _____</b></p>

*The instructor reserves the right to make changes to this outline at his or her discretion and as warranted by, for example, opportunities for field trips, guest speakers, changes in the law, etc. The class objectives will be met regardless of deviation from this outline.*

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textbook reading assignments, and study guide homework plus diagrams, flashcards, and practice tests all when appropriate to augment learning. The time spent in preparation for or reflection on course lecture will approximate two hours outside of class for each lecture credit hour utilized by the instructor in delivery of the materials and ¼ hour outside of class for each hour of structured lab time.