

North Hennepin Community College

PLEG 2710: Wills, Trusts and Estate Administration

A. COURSE DESCRIPTION

Credits: 3

Lecture Hours/Week: *.*

Lab Hours/Week: *.*

OJT Hours/Week: *.*

Prerequisites:

This course requires the following prerequisite

PLEG 1111 - Introduction to Law and Paralegal Studies

Corequisites: None

MnTC Goals: None

This course presents a study of estate administration, including the preparation and use of wills and trusts as estate planning tools. Students will study powers of attorney and the use of health care directives for disability planning. The students will learn the fundamental principles of probate law and how to prepare documents used in probate procedures. Students will also learn about the impact of estate taxes on estate planning. In addition, this course examines the ethical considerations relating to estate planning, wills and trusts. Prerequisite: PLEG 1111

B. COURSE EFFECTIVE DATES: 09/09/1997 - Present

C. OUTLINE OF MAJOR CONTENT AREAS

1. a. Estate planning basics
- b. Wills
- c. Trusts
- d. Powers of attorney
- e. Health care directives
- f. Joint tenancy and other non-probate transfer tools
- g. Probate documents and procedures
- h. Income, estate and gift taxation
- i. Forms 706 and 709

D. LEARNING OUTCOMES (General)

1. Demonstrate a general understanding of the legal processes and legal concepts related to estate planning (ELO 2, Program Goal 1).
2. Analyze and apply Minnesota Statutes applicable to wills, trusts and probate procedures in Minnesota (ELO 2, Program Goal 4).
3. Demonstrate an understanding of the different forms of wills and trusts (ELO 2, Program Goal 1).
4. Prepare a simple will (ELO 2, Program Goal 3, Program Goal 6).
5. Demonstrate an understanding of probate rules and procedures (ELO 2, Program Goal 1).
6. Demonstrate an understanding of the roles and responsibilities of the paralegal and of the lawyer in estate planning and probate (ELO 2, ELO 3, ELO 4, Program Goal 1, Program Goal 2).
7. Prepare selected documents used in probate proceedings (ELO 2, ELO 4, Program Goal 3, Program Goal 6).
8. Demonstrate an understanding of those ethical principles that govern a paralegals work in estate planning and probate (ELO 2, ELO 3, ELO 4, Program Goal 2).
9. Demonstrate an understanding of powers of attorney and health care directives. (ELO 2, Program Goal 1, Program Goal 6)
10. Demonstrate an understanding of income, estate and gift taxation and Forms 706 and 709 (ELO 2, Program Goal 1, Program Goal 6)

E. Minnesota Transfer Curriculum Goal Area(s) and Competencies

None

F. LEARNER OUTCOMES ASSESSMENT

As noted on course syllabus

G. SPECIAL INFORMATION

1. Knowledge of Human Cultures and the Physical and Natural World--Through study in the sciences, mathematics, social sciences, humanities, histories, languages, the arts, technology and professions.
2. Intellectual and Practical Skills--Including: Inquiry and analysis; Critical and creative thinking; Written and oral communication; Quantitative literacy; Information literacy; Teamwork and problem solving.
3. Personal and Social Responsibility and Engagement--Including: Civic knowledge and involvement--campus, local and global; Intercultural knowledge and competence; Ethical reasoning and action; Foundations and skills for lifelong learning.
4. Integrative and Applied Learning--Including: Synthesis and advanced accomplishment across general education, liberal studies, specialized studies and activities in the broader campus community.