

# OAKLAND UNIVERSITY PARALEGAL PROGRAM SYLLABUS

## ESTATE PLANNING CEPL 25690-90125.201733

<b>Text:</b>	<i>Wills, Trusts, and Estates for Paralegals</i> Author: Diana L. Anderson – Publisher: Wolters Kluwer (Aspen College Series)
<b>Faculty:</b>	Michael Hughes, Esq. Munger & Associates, P.C.
<b>Contact Information:</b>	4545 Clawson Tank Dr., Ste. 100 Clarkston, MI 48346 Office: 248-618-1200 Email: michaelhughes@oakland.edu
<b>Availability:</b>	Email: anytime Office hours: by appointment
<b>Schedule:</b>	6:30 – 9:30 p.m. Every Wednesday for 7 sessions
<b>Credit Hours:</b>	2.1 CEU
<b>Course Description:</b>	Overview of principles relating to the control and disposition of property both inter vivos and after death. Includes discussion of wills, intestate succession, trusts, future interests, disability planning and living wills. Fundamental gift, estate and inheritance tax and probate considerations are introduced as part of the estate planning process. Students draft several representative documents.
<b>Course Requirements:</b>	Written assignments, including drafting of estate planning documents based on a fictional client scenario, class participation, textbook and outside readings, and weekly quizzes. Sessions and written assignments will incorporate textbook and supplemental materials provided to students.
<b>Learning Outcomes:</b>	The following competencies should be achieved: substantive knowledge and the ability to apply a fundamental understanding of the various estate planning tools and techniques in Michigan, the role the paralegal plays in assisting attorneys and clients with the estate planning process, understanding of both the procedural and substantive elements required as an estate planning paralegal, written and oral communication proficiencies.
<b>Attendance:</b>	Attendance is a factor in awarding CEUs with 2 absences allowed for this course.
<b>Academic Honesty:</b>	Plagiarism is a serious academic offense that will not be tolerated and may result in failure for individual projects, course failure, or dismissal from the University. Submit work that represents your original words or ideas. Using another's work or idea without acknowledgement or permission, or cheating in any form, is a serious violation. For Academic Conduct Policy see <a href="http://www.sba.oakland.edu/ce/paralegal">http://www.sba.oakland.edu/ce/paralegal</a> -Detailed Program Information

**Course Standards:**

It is the responsibility of each student to be prepared for each session. All assignments must be submitted on their due date. Students are expected to complete reading assignments prior to the scheduled class. It is required that students actively involve themselves in class discussions. Missing class, late arrivals, or lack of preparation will affect the Class Participation portion of the grade. All documents are to be computer generated, 8½ x 11, stapled in the upper left-hand corner, and comply with University standards. Students are responsible for arranging with a classmate to obtain missed notes, materials, or assignments. **Students are responsible to make arrangements with the instructor to make up any missed quizzes or assignments.**

**No cell phone or other related electronic device use in class. Set phones to vibrate, and leave class if a response is necessary.**

<b>Evaluation Methods:</b>	Written Projects (2)	50%
	Weekly Quizzes (6)	20%
	Final Exam	20%
	Class Participation	<u>10%</u>
		100%

**Late assignments are marked down 10% for each day late.**  
**All assignments must be satisfactorily completed for course credit.**

3.6 to 4.0= A	92-100= 4.0	80-85= 3.0	68-69= 1.8
3.0 to 3.5= B	90-91= 3.6	78-79= 2.8	66-67= 1.5
2.0 to 2.9= C	88-89= 3.5	76-77= 2.5	60-65= 1.0
1.0 to 1.9= D	86-87= 3.3	70-75= 2.0	0-59= 0.0
0.0 to 0.9= No credit/CEU			

# ESTATE PLANNING

## READING ASSIGNMENTS

January 3, 2018

WEEK & DATE	DISCUSSION TOPICS	ASSIGNMENTS
1 1-10-18	Introduction to Estate Planning Intestate Succession Forms of Ownership Gathering Information	Chapter 1 (21)
2 1-17-18	Requirements to Make a Will Bequests and Lapse Testamentary Capacity/Undue Influence	Chapter 2 (15) Chapter 3 (17)
3 1-24-18	Basic Wills	Chapter 4 (25)
4 1-31-18	Revocable Living Trusts Drafting a Trust	Chapter 5 (14) Chapter 6 (15)
5 2-7-18	Planning for Incapacity: Medical and Financial Powers of Attorney	Chapter 15 (20) <b>Project #1 DUE</b>
6 2-14-18	Estate and Gift Tax	Chapter 9 (19)
7 2-21-18	Complex Wills Complex Trusts <b>FINAL EXAM</b>	Chapter 7 (16) Chapter 8 (12) <b>Project #2 DUE</b>

**All reading assignments must be completed prior to the assigned class period.**

**All Projects must be turned in at the beginning of the assigned class period.**