



## **Wills, Trusts, and Estates Program Overview**

The Wills, Trusts, and Estates Advanced Paralegal Course uses succinct coverage of key topics, as well as helpful guides and step-by-step instructions, to prepare you for your role as a paralegal in the administration of wills, trusts, and estates. This course will prepare you to assist attorneys as they plan estates, explain rights, draft wills, set up trusts, appoint personal representatives, probate wills, file estate taxes, and represent clients in probate court. The e-text that accompanies this course is easy to understand, with clear examples and a state-by-state analysis of trust and estate law.

### **Program Objectives**

- To describe the benefits of having a will
- To explain the implications of dying without a will
- To list the categories of facts needed for estate planning
- To distinguish between real property and personal property
- To describe the different kinds of nonprobate property
- To determine how property is distributed through the law of intestate succession
- To describe the legal requirements for executing, changing, and revoking a will
- To understand typical paragraphs in a will
- To explain laws enacted to protect family members
- To list advantages and disadvantages of different kinds of trusts
- To describe some of the uniform laws
- To list the titles and duties of a personal representative
- To understand different types of probate proceedings
- To learn about the tax forms a personal representative must file
- To explain the law on advance directives and anatomical gifts

# **Program Outline**

## **Lesson 1: Introduction to Estate Planning and Administration; Sources of Property**

Chapter 1: General Overview of Estate Planning and Estate Administration

Chapter 2: Sources of Property

## **Lesson 2: Laws of Succession and Trusts**

Chapter 3: The Laws of Succession

Chapter 4: Trusts

## **Lesson 3: Wills**

Chapter 5: Wills

## **Lesson 4: Estate Planning for the Elderly**

Chapter 6: Estate Planning for the Elderly

## **Lesson 5: Estate Administration**

Chapter 7: Estate Administration

## **Lesson 6: Taxation and Estate Law Comparison**

Chapter 8: Taxation

Chapter 9: Comparison of Estate Law in the Different Jurisdictions