Wills, Trusts, & Estates PROGRAM OUTLINE

Blackstone Career Institute™
Since 1890

PROGRAM OVERVIEW

Blackstone's correspondence Wills, Trusts, & Estates advanced paralegal course uses succinct coverage of key topics, as well as helpful guides and step-by-step instructions, to help prepare students for their role as a paralegal in the administration of wills, trusts, and estates. The accompanying textbook, Basic Wills, Trusts, and Estates for Paralegals presents how 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. It also includes clear examples and a state-by-state analysis of trust and estate law.

PROGRAM OUTLINE

Lesson 1 | Introduction to Estate Planning and Administration; Sources of Property

Lesson 2 | Laws of Succession and Trusts

Lesson 3 | Wills

Lesson 4 | Estate Planning for the Elderly

Lesson 5 | Estate Administration

Lesson 6 | Taxation and Estate Law Comparison

Introduction to Estate Planning and Administration; Sources of Property

LESSON 1

This lesson provides a general introduction to the topics that will be discussed in detail in the subsequent chapters, as well as an overview of the paralegal's role with respect to estate law. Presents four different familial situations that will be used throughout the text to exemplify the legal points discussed. Explains the main methods used to accumulate assets during a person's lifetime, and indicates some methods that may be used, besides a will, to dispose of those assets according to his or her wishes. Presents a methodology for creating an effective estate plan and an overview of the probate process and important terminology. Illustrates all of the various types of property a person might possess, presenting the legal rights and obligations attached to personal property.

Laws of Succession and Trusts

LESSON 2

This lesson describes the laws of descent and distribution; explains how blood ties affect testamentary dispositions and estate administration. Presents a detailed discussion of the legal concept of trust law and provides some practical guidelines for the drafting of simple trust instruments.

Wills

LESSON 3

This lesson explains the requirements necessary to create a valid will and guides students through the process of drafting a simple testamentary disposition, including all incidental documents. Describes the procedures to executing a will.

Estate Planning for the Elderly

LESSON 4

This lesson highlights the concerns of estate planning for an aging population; introduces some concepts that are of importance to an older clientele; discusses the concerns and problems of older Americans in obtaining adequate and appropriate health care, the problems of guardianship, income maintenance, and the special ethical concerns for dealing with an elderly client.

Estate Administration

LESSON 5

This lesson covers the various forms that may be encountered in administering a decedent's estate. Sample forms are provided from different states to illustrate the practical aspect of estate administration. Highlights the different forms that a paralegal may be responsible for obtaining and completing under the guidance of an attorney in the pre-probate phase, in addition to forms that must be completed and filed with the probate court. The different types of estate administration that might be possible are detailed, as well as the procedure established by the court for entertaining any challenges to the petition. Details all of the steps that must be taken in the efficient administration of a decedent's estate.

Taxation and Estate Law Comparison

LESSON 6

This lesson provides an overview of the problems incident to the taxation of a decedent's estate. Deals exclusively with federal taxation, and pays particular attention to the primary federal estate tax return, the 706. Focuses attention on the different types of taxes that the personal representative may be responsible for in the administration of the decedent's estate. Explores the sources of federal tax law and provides a detailed analysis of the primary tax forms that will usually have to be completed by the personal representative. Provides a brief look at the estate law of various jurisdictions.

PROGRAM OUTCOMES

- Describe the benefits of having a will
- Explain the implications of dying without a will
- List the categories of facts needed for estate planning
- Distinguish between real property and personal property
- Describe the different kinds of nonprobate property
- Determine how property is distributed through the law of intestate succession
- Describe the legal requirements for executing, changing, and revoking a will
- Understand typical paragraphs in a will

PROGRAM OUTCOMES

- Explain laws enacted to protect family members
- List advantages and disadvantages of different kinds of trusts
- Describe some of the uniform laws
- List the titles and duties of a personal representative
- Understand different types of probate proceedings
- Learn about the tax forms a personal representative must file
- Explain the law on advance directives and anatomical gifts

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