

Common Course Outline
PALG 203
Estate Administration for Paralegals
3 Semester Hours

The Community College of Baltimore County

Description

PALG 203 – 3 credits - Estate Administration for Paralegals focuses on law of estates and trusts in Maryland. This course covers property ownership, estate planning, will drafting and execution, and trusts. It also examines the administration of small and regular estates through the probate process.

Prerequisite: PALG 103

Overall Course Objectives

Upon successful completion of this course, students will be able to:

1. apply the sources of law relating to wills and estates;
2. examine the need for estate planning;
3. differentiate between the roles of the attorney, paralegal and personal representative in estate administration;
4. explain the orphans/probate court's jurisdiction;
5. classify the various kinds of property;
6. distinguish the various forms of ownership of real and personal property;
7. define legal terms relating to wills, intestacy, probate, and estate administration;
8. apply Maryland intestate succession laws to determine who is entitled to share in the estate;
9. differentiate between the advantages of a will and a trust;
10. contrast the purpose and usage of will substitutes;
11. describe the requirements for a valid Maryland will;
12. contrast the methods of modification and revocation of a will;
13. compare checklists for: family data, family advisors, assets, liabilities, life insurance, and location of documents;
14. differentiate between the various types of personal representatives;
15. explain the basic functions of the personal representative;
16. differentiate between the various types of probate proceedings in Maryland;
17. examine federal and state tax implications in estate planning and during estate administration; and
18. apply the probate procedures and prepare the necessary legal forms for opening of an estate in Maryland.

Major Topics

- I. Wills
- II. Trusts
- III. Estate Planning
- IV. Estate Administration
- V. Tax Implications in Estate Planning and Estate Administration
- VI. Laws of Succession
- VII. Probate
- VIII. Property Concepts Relating to Wills, Estates and Trusts
- IX. Personal Representatives
- X. The Role of the Paralegal in Estate Planning and Estate Administration
- XI. Ethical Issues Involving Estate Planning and Estate Administration

Course Requirements

Grading procedures will be determined by the individual faculty member and specific assignments and procedures for evaluating student performance will be described in the individual class syllabus, but will include the following:

Grading/exams: A minimum of two exams: a mid-term and a final (the final does not have to be cumulative) OR two major written projects combining objective and analytical/critical thinking components such as researching and analyzing a fictional client's case and a preparing a written memorandum detailing the law on point and the student's application and analysis of the law to the client's situation; or the preparation of documents for the filing of a fictitious probate estate in Maryland.

Writing: A minimum of two written assignments to allow for both objective and analytical review of primary legal sources, such as case briefs, a valid Maryland will, or a written comparison/analysis of cases and/or statutes involving estates in Maryland.

Other Course Information

This course is a Paralegal Studies required course for degree students and an elective for certificate students. It is taught in the classroom using a variety of instructional techniques, which are intended to meet the varied learning styles of our diverse population.