



Paralegal Studies Program

Los Angeles
Mission College

Syllabus

Law 13 - Wills & Trusts

Fall 2013

Fall 2013 - Section #0303

Instructor: [Elise Lampert, Attorney at Law](#)

Office: Online Office Hours Only

Office hours: Wednesdays (by phone) 4:00 – 5:00 PM, or by appointment.

Phone: **Office phone - (818) 905-0601 fax all forms - 800-863-4143**

Email: profelise@sbcglobal.net

etudes site: <http://etudes.org>

Textbook:



Lexis Nexis is required for the class

<http://abogado.pbworks.com/w/page/63168047/lexisnexis>

click [on this link to order your textbook](#)

Resource: [Law 13 - Class Materials](#)

Course Description:

Study of the law of wills and trusts, including simple wills, codicils, trust forms, living trusts, pour over wills, advance directives, powers of attorney, guardianship, conservatorship, caretakers, basic estate planning, life estates, disposition of property outside probate, tax issues, and life insurance trusts.

Below are the Quizzes from your Law 13 - Course Materials

Quiz # A - Wills and Trusts

Quiz # B - Wills and Trusts

Quiz # C - Wills, Trusts and Elder Law

Quiz # D - Wills, Trusts and Elder Law

Quiz # E - Wills, Trusts and Elder Law

Course Organization: Law 13 is organized into assignments, quizzes, and forum discussions.

Student Learning Outcomes: Upon successful completion of this course, a student will be able to:

1. Brief law cases in wills and trusts including living wills, living trusts, guardianships and conservatorships.
2. Critically analyze and argue issues of wills, trusts, living trusts, powers of attorney, advance directives, and estate planning devices.
3. Prepare legal documents, forms or papers for a simple and complex will, a trust, living trust, health care and advance directives, along with conservatorships and guardianships, and powers of attorney.

Skill Level: College level reading and writing; ability to access the internet. Necessary skills include proficiency using a word processing program, including spell checker, using a web browser, sending and receiving email, saving documents as RTFs (rich text format), uploading and attaching documents.

Estimated Time per Week: 10 hours (see [Carnegie Rule](#))

Class format: The class is entirely online. No on campus meetings are required. . We use the [etudes](#) course management system Carefully read [our policies](#).

The class follows a weekly format. If you click on "Section Links" in upper left corner of your moodle class, you will see the weekly assignments, quizzes, forums and activities. There are many opportunities for you to participate and earn points to attain a good grade.

Online classes require your attention and effort. If you fail to log into the class during the first two weeks you will be excluded from the class. There are activities and assignments each week; you will need to log into the class several times a week.

To be a successful online/hybrid student, you need to do schedule a regular time for studying, read and complete on line activities, and [more](#).

Technical Requirements: The minimum computer requirements are: Computer, either a Macintosh or IBM compatible; modem, minimum 28.8, broadband or high speed internet access is preferred and is required to view the videos. Software: Web browser software, preferably Firefox 3.5 or Internet Explorer 8, an e-mail address and a word processing program.

Get Firefox: <http://www.mozilla.com/en-US/firefox/all.html>

Get Internet Explorer: <http://www.microsoft.com/windows/Internet-explorer/default.apx>

Get a free email account at: www.mail.google.com

Students who do not have regular computer access may use computers in the campus Learning Resource Center. Be sure to save all your papers and assignments on a flash drive.

Course Login: <http://moodle.lamission.edu>

First Assignment: Introduce yourself to the class under the forum discussions for the first week. This is where you will get to know your classmates. Post your introduction by Sunday evening, 11:59 pm, 9/15/13. You may be withdrawn from class if you do not post your introductions by the end of the 2nd week of class.

Contacting Your Instructor: I check my email several times a day and respond to emails within 24 hours. Please don't hesitate to contact me with any questions; email me at: profelise@sbcglobal.net in the subject line put: Law 13 #0303. I am also available by telephone on Wednesdays, 4:00 – 5:00 PM.

Discussion Forums: The discussion forums are the main area for class participation. The weekly discussions open on Mondays and close the following Sunday at 11:55 PM. Initial posts are due by Wednesdays at 11:55 pm. Initial posts should be at least two paragraphs in length (approximately 120-150 words), respond directly to the topic in a reflective manner, referencing the topic link and content provided, and applying the law or case materials. Respond to at least *two* students to each forum by Sunday evening at 11:55 pm.

CLASS BIOGRAPHIES/INTRODUCTIONS: You will find your instructor's autobiography posted in the "Discussion Board" of the class website. Please post your bio in the discussion board by Friday of week one. In your bio, please be sure to include:

- Your name (firstname only),
- Academic/Career Goals/Expectations of the class
- How you found out about the class/program
- Other items of interest, and
- Include any preliminary questions or concerns you have at this point.

DISCUSSION FORUMS: Every week a discussion questions posted to the website "FORUMS." You are required to post a answer to each discussion question by Wednesday of the forum week. Further, you are required to post, at least, one response to two or more of your classmates' initial responses. You are not required to respond to every classmate. You may, although this is a decision each student will make.

Minimum THREE different days per forum week. As we begin our online work together I want to discuss an important aspect of online learning, namely participation. **Participation** is an important part of this collaborative online learning environment. It is well documented that participation and collaboration does enhance learning & whether it be in-class or at a distance. You are encouraged to initiate and respond regularly and make sure *your ideas are presented clearly and are substantive. Postings that lack substance will receive little or no credit. For example, "I agree," "Good posting," or similar messages that add little or nothing to the discussion will receive few, if any credits.* Discussions posted to the website are an important part of the learning that takes place in this class. In essence, we learn from each other. Share ideas or questions with your colleagues. Ask them questions. Share your own experiences.

SOME SPECIFIC EXPECTATIONS ABOUT PARTICIPATION:

Class Meeting Discussions:

- **Please read, review, and reflect on each message PRIOR to posting to the forums.** Remember: Others cannot get visual clues as to meaning, therefore, be careful in what and how you communicate. **Once posted, messages cannot be deleted!**
- All postings to any meeting in this class are to be considered CONFIDENTIAL and for consideration and discussion only by members of this class.
- Ask questions about areas of the subject that you wish to better understand or for clarification and/or amplification.
- Read your classmates comments and presentations, and respond constructively.
- Offer personal/professional experiences/observations relevant to the items being discussed.

Participation Rubric:

	Unsatisfactory	Satisfactory	Exemplary
A minimum of 3 postings per forum on at least 3	Less than 3 substantial postings.	Three required substantial postings.	More than the 3 substantial required posting.

separate days. Answers by Wednesday	Posting answers after Wednesday	Posting answers on Wednesday	Posting answers before Wednesday

Respond to classmates by Sunday			
Well reasoned with appropriate analysis.	No response or lacks applicability.	Response is applicable, but may not be thorough or lacks depth.	Thorough response with appropriate depth.
Appropriate dialog with classmates	Responses do not clearly relate to topic.	Responses relate to topic.	Responses clearly relate to topic.
Appropriate grammar, spelling, and APA references.	Spelling and/or grammar errors.	No spelling or grammar errors..	No spelling, grammar errors, or punctuation errors.

Student deliverables should be submitted on the specified date by midnight of the student's time zone. For purposes of scheduling, each week or module begins on Monday 12:01 AM and concludes the following Sunday at Midnight.

EXPECTATIONS FOR WRITTEN WORK:

VOCABULARY - You are expected to read and understand the material presented in the assigned text and articles you locate.

FORMAT - Papers submitted should be written in accordance with the *APA*, *Bluebook*, or *other recognized formatting style*.

GRAMMAR - Use active voice in your writing. Also use the spelling and grammar check feature of your Word Processor before submitting your papers.

The following rubric is used to measure participation in the discussion forums.

Homework Assignments: Assignments require you to read and brief law cases. Read the information on "[briefing law cases](#)". Below is the grading rubric for your case "briefs"

CASE BRIEF GRADING RUBRIC

	Outstanding	Proficient	Adequate	Inadequate
	A	B	C	D/F
Case Name and Citation	Complete case name and properly formatted citation appear at the top of the case brief	Complete case name is provided but citation is incomplete	Complete case name is provided but no citation is give	Neither the case name nor the citation appears at the top of the case brief OR both case name and citation are incorrect.
Operative Facts	Operative facts are relevant to the issue being examined by the court and are logically organized.	Facts are relevant to the question being answered but lack coherence or organization.	Irrelevant facts are included. Lack of logical organization.	Relevant facts are omitted or lost in discussion of unrelated information.
Procedural Facts	Procedural history of the case is clearly and logically presented in proper chronology.	Procedural history of the case is presented but chronology is confusing.	Some procedural history is presented.	No procedural history is presented.
Issue/Short Answer	Includes all elements (applicable law, issue being examined and relevant facts) in a well crafted, grammatically correct question. Answer responds to question being posed.	Issue is separately articulated, but does not include all elements; applicable law, issue being examined and relevant facts. Answer responds to question being posed.	Issue is not separately articulated, but implied through description of facts or discussion of law. Answer does not respond to question being posed.	Issue is not articulated No answer is given.
Law	Law is correct and is relevant to the question being answered. Rule(s) of law succinctly paraphrased rather than quoted.	Law is correct and is relevant to the question being answered, but is not paraphrased	Rules of law are used in providing answer, but it is unclear if writer understands the law and is properly applying it.	Rules of law are omitted from answer or incorrect law is used.
Rationale	The court's reasoning is presented in a clear and logical fashion, leading the reader to an understanding of the rationale behind the law.	Law is applied to the facts, but the underlying rationale is not clear.	Analysis is unclear, causing the reader to question whether the law is correct.	No analysis of the law is given.
Writing Mechanics	Sentence structure, grammar, punctuation are substantially correct. Each component's material is logically organized and presented in a clear, concise manner.	Sentence structure, grammar, punctuation are substantially correct. Organization is logical but needs better consistency and clarity.	Adherence to rules of writing is poor. Material lacks organization and/or is unclear, making it difficult to understand.	Rules of writing are ignored or misunderstood. No apparent logic to the organization of the material. Writing lacks clarity.

**above adopted from case grading rubric - [AAFPE.org website](http://AAFPE.org)

Students who plagiarize will receive zero credit on the assignment.

Quizzes: The class is divided into weekly quizzes (10 short answers quizzes). This is 40% of your grade.

Late Assignments Our "[Late Work](#)" Policy is firm.

Grading Policy: Letter grades will be determined based upon the following:

Grade Distribution

Quizzes - 40 % of your grade

Assignments- 45 % of your grade

Forum Discussions- 15 % of your grade

Grade Scale:	A	90-100
	B	80-89
	C	70-79
	D	60-69
	F	≤ 60

Please note that a grade of C or higher is required for each of the 12 paralegal certificate classes.

Points will be posted on the class website after each activity closes.

Reasonable Accommodation: For students requiring accommodation the DSPS office provides special assistance in areas like: registering for courses, specialized tutoring, note-taking, mobility assistance, special instruction, testing assistance, special equipment, special materials, instructor liaisons, community referrals, and job placement. The phone number for the Office of Students with Disabled Student Programs and Services is: (818) 364-7732 and also their website at <http://lamission.edu/dsps>

Important Dates

Website opens Sunday 8/25/13 at 6 pm

Due Dates

GENERAL CALENDAR DATES

Due Dates

GENERAL CALENDAR DATES

Fall 2013

August 25, 2013
Residency Determination Date for Fall 2013

August 26, 2013
DAY & EVENING CLASSES BEGIN

August 31, 2013
SATURDAY classes begin for Fall 2013

September 02, 2013
Labor Day (College CLOSED)

September 06, 2013
ADD Dates Deadline to add full term (semester length) classes

September 06, 2013
Last day to add an AUDIT

September 06, 2013
Last day to do a SECTION TRANSFER

September 08, 2013
Last day to DROP(16-week classes) ONLINE ONLY classes without receiving a "W" or incurring fees or with refund

October 04, 2013
Last day to petition for Credit/No-Credit

October 18, 2013
Deadline to petition for Fall 2013 graduation

November 11, 2013
Veteran's Day (College CLOSED)

November 17, 2013
Last day to DROP classes with a "W" ONLINE ONLY - Letter grade is required after this date and forward

November 28, 2013 - December 01, 2013
Thanksgiving holidays (College CLOSED)

December 07, 2013
Classes End Fall 2013

December 09, 2013 - December 14, 2013

FINAL EXAMS FOR FALL 2013

December 15, 2013
Semester ends Fall 2013

After September 8, 2013 please note : This is an earlier and revised deadline. A “W” will appear on your transcript record after this date. This is a new LACCD enrollment limit. The limit is now three times to take a class and includes both substandard grades and withdrawals.

Drop classes with a “W” - Letter grade is required after this date and forward - November 17

If you stop attending a class (or wish to drop a class), **YOU MUST DROP THE CLASS YOURSELF ONLINE– OFFICIALLY – on or before November 17, 2013. Failure to do so may result in a grade of “F” in that class.**

REGISTRATION INFORMATION Website – <http://www.laccd.edu> (Student Information System)

Admission Regular Office Hours (Subject to change) Monday and Thursday – 8am-5pm Tuesday and Wednesday – 8am-7pm Friday – 8am-12noon

HOLIDAYS (College CLOSED)

Labor Day - September 2
Veteran’s Day – November 11
Thanksgiving – November 28 to December 1

Please note that if you do not drop the class by November 17th (internet), then you must receive a grade, and cannot request to be dropped or to receive and Incomplete grade.

*PLEASE NOTE: The District required earlier and revised deadlines starting Summer 2012. A “W” will appear on your transcript record after this date.

REMINDER: There is a new LACCD enrollment limit. The limit is now three times to take a class and includes both substandard grades and withdrawals. (See Important Notice, page 3 of the College Catalog)

If you stop attending a class (or wish to drop a class), **YOU MUST DROP THE CLASS YOURSELF – OFFICIALLY – on or before November 17th, 2013 (Internet).** Failure to do so may result in a grade of “F” in that class

New 3 Repeat Rule
IMPORTANT NOTICE
All Students Please Read
Beginning Summer 2012: New 3 Repeat Rule

EFFECTIVE SUMMER 2012, course withdrawal (“W”) or a substandard grade (“D,” “F,” or “NP”) count as an attempt at a course. Only three attempts at any one course will be allowed, with some exceptions. Listed below are the new rules that all students need to know about.

- Students who drop or are excluded after the last day to drop without a grade of “W” will have a “W” appear on their transcript. The “W” will count as an attempt for that course.
- For the Fall Semester, September 8, 2013 is the last day to drop a 16-week semester length class without a “W.” Students will be able to drop a class online until this date. Contact the office of Admissions and Records for deadlines on late start, short-term and special program classes.
- A course in a student’s transcript which currently shows a recorded “W” counts as an attempt for that course.
- Students will not be allowed to register for any course within the LACCD if there are three recorded attempts for that course in any combination of W, D, F, or NP grades.
- Add permits for a course within the LACCD will not be processed if there are three recorded attempts for that course in any combination of W, D, F, or NP grades.
- For courses specifically designated as “repeatable,” students may repeat up to three times (See Title 5 California Code of Regulations sections 55040, 55041, 58161).
- Where the student’s number of enrollments in a course exceeds the allowable amount, the student may petition for an additional enrollment in cases of extenuating circumstances.

What students should do:

- Be sure you are academically ready for classes you enroll in.
- If you must drop a course, drop before the specified deadline for dropping a class without a grade of “W.”

Calendar of Activities

[Read Wills Materials for Class](#)

All of the work below is done under etudes

Grade Distribution

Tests = 40% of your grade

Assignments - 45 % of your grade

[Discussion Forums](#) = 15 % of your grade

A = 90% or above

B = 80% or above

C = 70% or above

D = 60% or above

A grade of C or greater is required to pass the class

Quizzes

Quiz # A - Wills and Trusts

Quiz # B - Wills and Trusts

Quiz # C - Wills, Trusts and Elder Law

Quiz # D - Wills, Trusts and Elder Law Quiz # E - Wills, Trusts and Elder Law

Week 1 - Due 9/1/13

- Read the syllabus for the class there is no textbook for the class - all materials are on the internet
- Read "Where do I Start?"
- Read [Dear Online Student](#)
- Read Disposition of Property = with or without a will
- Read Law School Outline - see relevant Probate Code sections - <http://home.pon.net/jmt/law/TwoL/wt/syllabus.htm>
- Post your [Introduction](#)
- Discuss [Law Study](#)
- Discuss [Legal Argumentation](#)
- Discuss [Learning Ethics](#)
- Discuss [Strategies against Procrastination](#)
- Discuss [Reading Law Cases-Codes](#)

Week 2 - Due 9/8/13

- Read Trusts and Wills Outline - <http://www.profj.us/26sp/law13/oxy-dj/law13/trustout.htm>
- Read Wills and Trusts cases - <http://www.profj.us/26sp/law13/oxy-dj/law13/trustbriefs.htm>
- #1 Read and analyze the Maccallum case
- #2 Prepare and Post your simple will - <http://profj.us/25sp/law13/samplewill.htm>
- forum discussion

Week 3 - Due 9/15/13

- Read Chapter 53 of Textbook - <http://profj.us/26sp/law13/lamc-dj/law13/wills.htm>
- Read Lecture notes on Chapter 53 of Textbook - <http://profj.us/26sp/law13/lamc-dj/law13/chp53text.htm>
- #3 Read and analyze Revocation of Will Case
- #4 Read and analyze Validity of Wills case
- Quiz #A - Wills and Trusts Quiz
- forum discussion

Week 4 - Due 9/22/13

- Read Wills and Trusts Cases - <http://profj.us/26sp/law13/oxy-dj/law13/wblwillcases.htm>
- #5 Prepare California Statutory Will - <http://abogado.pbwiki.com/califwill>
- #6 Analyze Recent Wills and Trusts Case and post - http://www.swlearning.com/blaw/cases/topic_wills.html
- #7 Read and Analyze Breach of Fiduciary Duty - Estate of Martin - <http://yourlawprof.com/22w/law13/martin.htm>
- forum discussion

Week 5 - Due 9/29/13

- Review Powerpoint slides on Wills, Trusts and Elder Law - <http://profj.us/26sp/law13/lamc-dj/law13/chp50.ppt>
- Read notes on wills and trusts - <http://profj.us/26sp/law13/lamc-dj/law13/chp50.htm>
- #8 Read and analyze Resulting Trusts - Kling case - <http://yourlawprof.com/22w/law13/kling.htm>
- #9 Read and analyze Revocation of Wills - Calhoun case - <http://yourlawprof.com/22w/law13/calhoun.htm>
- Quiz B - Wills and Trust
- forum discussion

Week 6 - Due 10/6/13

- Read Introduction to Living Trusts - <http://www.living-trusts.net/intro-living-trusts.html>
- Review Intervivos Information - <http://missionparalegal.com/intervivos.htm>
- #10 Testamentary Capacity - Burke case - <http://yourlawprof.com/22w/law13/burke.htm>
- #11 What are living trusts - Differences between wills an living trusts - <http://www.lectlaw.com/files/qfl05.htm>
- forum discussion

Week 7 - Due 10/13/13

- Review Peter Pan Living Trust - What are living trusts - Differences between wills an living trusts - <http://www.lectlaw.com/files/qfl05.htm>
- Review General Revocable Trusts - <http://missionparalegal.com/revtrust.htm>

- Review Pour Over Will - <http://missionparalegal.com/pourover.htm>
- #12 Post your Living Trust
- #13 Post your Pour Over Will - sample pour-over-will - <http://abogado.pbworks.com/w/page/62648810/sample-pour-over-will>
- forum discussion

Week 8 - Due 10/20/13

- Read Additional Information on Living Trusts - <http://profj.us/26sp/law13/lamc-dj/law13/infolivingtrusts.htm>
- Read and analyze Smith Living Trust - <http://profj.us/26sp/law13/lamc-dj/law13/smithtrust.htm>
- #14 Read and analyze Tyler Trust Case - <http://profj.us/25w/law13/trusts.htm>
- Quiz #C - Chp. 51 Quiz 1 Wills, Trusts, and Elder Law Quiz
- forum discussion

Week 9 - Due 10/27/13

- Review Top Ten Planning Resources Estate <http://home.pon.net/jmt/law/TwoL/ep/epweb/topten.htm>
- #15 Summarize Steps in Administering a California Estate - <http://home.pon.net/jmt/law/TwoL/ep/eprn/ea.htm>
- forum discussion

Week 10 - Due 11/3/13

- Read about Advanced Health Care Directives - <http://profj.us/26sp/law13/lamc-dj/law13/healthpoa.htm>
- Read about [Power of Attorney](#)
- #16 Prepare an Advanced Health Care Directive - <http://profj.us/26sp/law13/healthpoa.htm>
- #17 Prepare a Crumney Family Trust

Week 11 - Due 11/10/13

- Read about Guardianships
- #18 Prepare Caretakers Affidavit Form - <http://profj.us/25w/law13/ctform.htm>
- #19 Guardianships
- Quiz #D - Chp. 51 Quiz 2 Wills, Trusts, and Elder Law Quiz
- forum discussion

Week 12 - Due 11/17/13

- Read about [Conservatorships](#)
- #20 Conservatorships
- forum discussion

Week 13 - Due 11/24/13

- Read about [Emancipations](#)
- #21 Emancipations
- Quiz #E - C hp. 51 Quiz 3 Wills, Trusts, and Elder Law Quiz
- forum discussion

Week 14 - Due 12/1/13

- Read [Simplified Probate Procedures](#)
- Read [Petition to Establish Birth](#)
- #22 Probate Substitutes
- #23 Petition to Establish Birth
- Extra Credit Ethics Assignment
- forum discussion

Week 15 - Due 12/8/13

- Read about [Life Insurance Trusts](#)
- #24 Life Insurance Trusts
- forum discussion

Week 16 - Due 12/15/13

- #25 - [Probate Administration](#)
- forum discussion
-

SPECIAL ACCOMMODATIONS

If you require special accommodations for a disability, religious holiday, or any other reason please inform your instructor(s) within the first week of the course and we will accommodate you if at all possible. For accommodations due to disability, you must consult with the Disabled Students Programs and Services Office after which we will abide by their recommendations.

COLLEGE RESOURCES FOR LAMC STUDENTS
see <http://lamission.edu/de/student-services>

Admissions and Records: Students can register for classes, request transcripts, file

petitions for graduation, and drop classes at this office. For more information call 818-833-3322 or visit: <http://www.lamission.edu/admissions/>

Assessment Center: Offers student assessments in English, English-as-a-Second-Language (ESL) and Mathematics. Please contact the Assessment Center at (818) 364-7613 for more information or visit <http://www.lamission.edu/assessment/>

Bookstore: For hours of operation, book availability, buybacks, and other information call 818-364-7767 or 7768 or visit <http://eagleslanding.lamission.edu/default.asp>

Counseling Department: For appointments and information call 818-364-7655 or visit

<http://www.lamission.edu/counseling/>

Disabled Students Programs and Services (DSP&S): For appointments, eligibility and

information call 818-364-7732 or visit <http://www.lamission.edu/dsps/>

Extended Opportunity Programs and Services (EOP&S): For appointments, eligibility and information call 818-364-7645 or visit <http://www.lamission.edu/eops/>

Financial Aid: For information and applications call 818-364-7648 or visit

<http://www.lamission.edu/financialaid/>

Library: For information on hours, resources, workshops, and other services contact 818-364-7106 or visit <http://www.lamission.edu/library/>

STEM Office: For information on free tutoring, resources and academic counseling for

STEM (Science, Technology, Engineering, and Technology) students visit: <http://www.lamission.edu/stem>

Tutoring Services in Learning Center: Laboratories for Learning, Writing, Math &

Science. Walk-in and appointment services offered. Call 818-364-7754 or visit

www.lamission.edu/learningcenter/

Three Attempt Limit

A new state policy in effect as of 2012 limits students to **three attempts per course**.

Receiving a grade or a "W" for a course counts as an attempt, **regardless of when the course was taken**. Withdrawal by the deadline to avoid a "W" will not count as an attempt. For Spring 2013 the deadline to avoid a "W" is Monday, February 18th.

updated /12/13 @ 9:58 pm