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Paralegal Studies Program

Los Angeles
Mission College

Syllabus

Spring 2017

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Law 13 - Wills & Trusts - Section #0373

[Prof Elise Lampert](#) - [Activities](#) - [Textbooks](#)

Read [Dear Online Student](#) - [Study Guide](#) and [Welcome Message](#)

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

Canvas <https://ilearn.laccd.edu>

Activities <http://lamission.org>

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

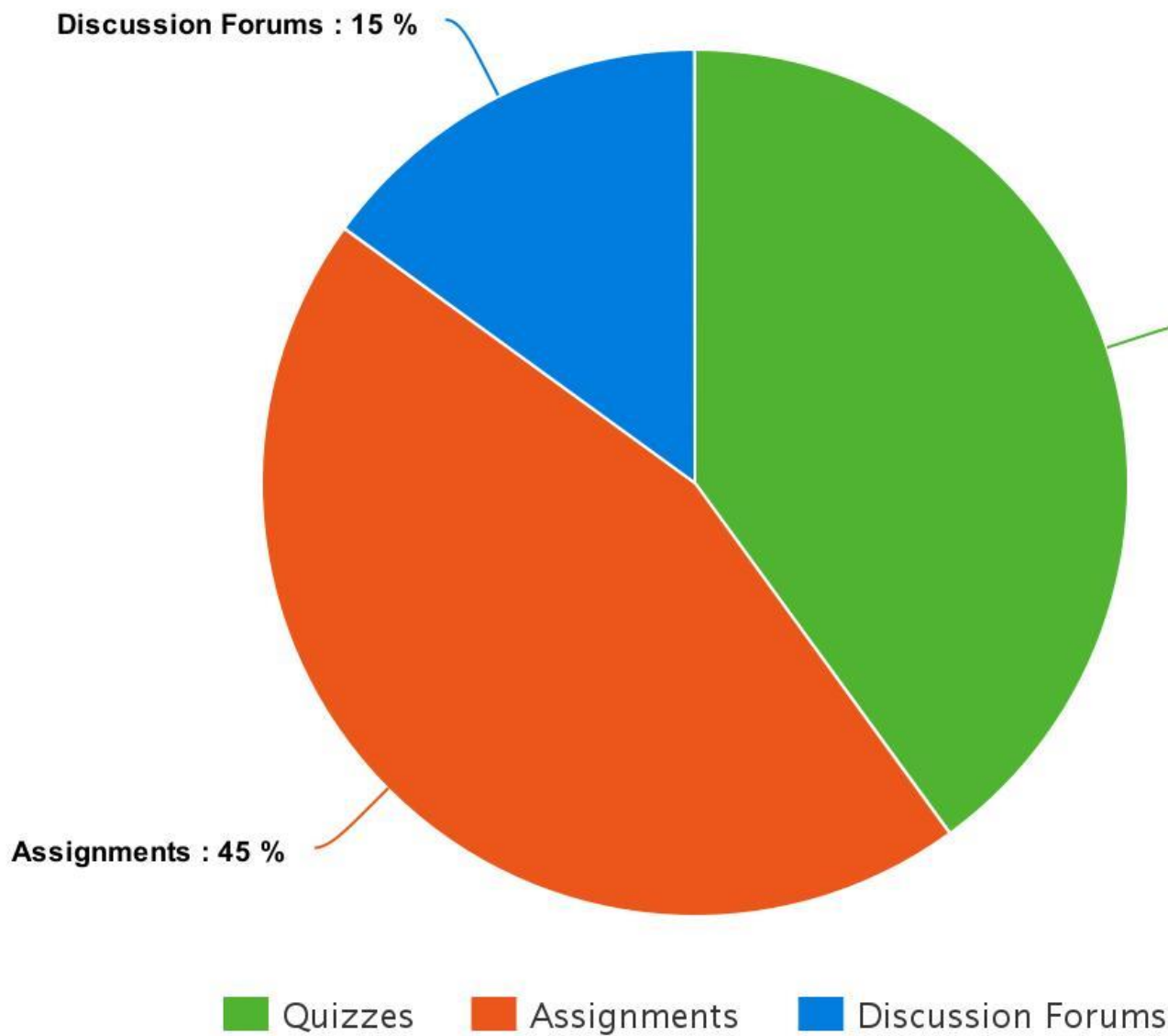
Course Organization: Law 13 is organized into assignments, quizzes, and forum discussions.

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

Week 1 - Due 2/12/17

- Read the syllabus for the class - [Lexes](#) is required for this class
- 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](#)
- Read [Law Study](#)
- Read [Legal Argumentation](#)
- Read [Learning Ethics](#)
- Read [Strategies against Procrastination](#)
- Read [Reading Law Cases-Codes](#)

Week 2 - Due 2/19/17

- Read Trusts and Wills Outline
- Read Wills and Trusts cases -
- #1 Read and analyze the Maccallum case
- #2 Prepare and Post your simple will
- forum discussion

Week 3 - Due 2/26/17

- Read Chapter 53 of Textbook
- Read Lecture notes on Chapter 53 of Textbook
- #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 3/5/17

- Read Wills and Trusts Cases
- #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

- forum discussion

Week 5 - Due 3/12/17

- Review Powerpoint slides on Wills, Trusts and Elder Law
- Read notes on wills and trusts
- #8 Read and analyze Resulting Trusts - Kling case
- #9 Read and analyze Revocation of Wills - Calhoun case
- Quiz B - Wills and Trust
- forum discussion

Week 6 - Due 3/19/17

- 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
- #11 What are living trusts - Differences between wills an living trusts - <http://www.lectlaw.com/filesh/qfl05.htm>
- forum discussion

Week 7 - Due 3/26/17

- Review Peter Pan Living Trust - What are living trusts - Differences between wills an living trusts - <http://www.lectlaw.com/filesh/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 4/2/17

- Read Additional Information on Living Trusts
- Read and analyze Smith Living Trust
- #14 Read and analyze Tyler Trust Case
- Quiz #C - Chp. 51 Quiz 1 Wills, Trusts, and Elder Law Quiz
- forum discussion
- **Spring Break 4/3 - 4/9**

Week 9 - Due 4/16/17

- 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/epr/ea.htm>
- forum discussion

Week 10 - Due 4/23/17

- Read about Advanced Health Care Directives
- Read about [Power of Attorney](#)
- #16 Prepare an Advanced Health Care Directive
- #17 Prepare a Crumney Family Trust

Week 11 - Due 4/30/17

- Read about Guardianships
- #18 Prepare Caretakers Affidavit Form -
- #19 Guardianships
- Quiz #D - C hp. 51 Quiz 2 Wills, Trusts, and Elder Law Quiz
- forum discussion

Week 12 - Due 5/7/16

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

Week 13 - Due 5/14/17

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

Week 14 - Due 5/21/17

- 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 5/28/17

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

Week 16 - Due 6/4/17

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

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 Canvas 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>

Google Chrome - <http://chrome.google.com>

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: <https://ilearn.laccd.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 of the 2nd week. You may be dropped from the 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 #0373. 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 11:59 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 11:59 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

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.

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.

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"

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.

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

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. Their website is <http://lamission.edu/dsps>

Cheating. Unauthorized material used during an examination (including electronic devices), changing answers after work has been graded, taking an exam for another student, forging or altering attendance sheets or other documents in the course, looking at another student's paper/answers/essay/computer or exam with or without their approval is considered cheating. Any student caught cheating will receive a zero for the assignment/exam and referred to the Department chair and/or Student Services for further disciplinary action.

Plagiarism. Plagiarism is defined as the act of using ideas, words, or work of another person or persons as if they were one's own, without giving proper credit to the original sources. This includes definitions found online on Wikipedia, materials from blogs, twitter, or other similar electronic resources. The following examples are intended to be representative, but not all inclusive:

- ✓ Failing to give credit by proper citations for others ideas and concepts, data and information, statements and phrases, and/or interpretations and conclusions.

- ✓ Failing to use quotation marks when quoting directly from another, whether it be a paragraph, a sentence, or a part thereof
- ✓ Paraphrasing the expressions or thought by others without appropriate quotation marks or attribution
- ✓ Representing another's artistic/scholarly works such as essays, computer programs, photographs, paintings, drawings, sculptures or similar works as one's own.

For the first offense, you will receive a zero for the assignment in question. Any further offenses may result in expulsion from the class, as determined by the disciplinary action from the Office of Student Services.

Website opens 2/6/17

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.

"MANAGEMENT OF STRESS AND MENTAL HEALTH:

As a student, not only do you have the pressure of succeeding in school, you may also be contending with work, financial issues, relationships, managing time effectively, getting enough sleep, etc. The staff and faculty of Los Angeles Mission College are here to provide support that will help you to be successful in your academic pursuits. You can learn more about the broad range of confidential student services offered on campus, including counseling and mental health services, by either visiting the Student Health Center (SHC), which is currently located in the Bungalow just west of the Collaborative Studies Building*, checking out the SHC webpage at: <https://www.lamission.edu/healthcenter/> or calling: 818 362-6182.

I also encourage you to enter the National Suicide Prevention Lifeline number (1-800-273-8255) into your cell phone in case you or someone you know is in distress and needs someone with whom to talk.

Please note that the SHC is slated to move into its new location, between the President's Office and Administrative Services, in the spring 2016 semester.

COLLEGE RESOURCES FOR LAMC STUDENTS

see <http://lamission.edu/de/student-services>

updated 12/31/16