

Administration of Estates

Legal Specialty Course Information Sheet

Course Information

Organization	Madison Area Technical College
Developers	Anne W. Schacherl
Development Date	5/25/2004
Revised Date	1/19/2009
Course Number	10-110-114
Instructional Level	Two-Year Paralegal Associate Degree Two-Semester Paralegal Post-Baccalaureate Certificate
Potential Hours of Instruction	54
Total Credits	3

Course Description

Basic legal concepts surrounding guardianships, wills, trusts, and intestacy, including probate forms and procedures as well as inheritance tax returns are covered in the Administration of Estates class. Prerequisite(s): 110-101 Introduction to Paralegalism & Legal Ethics.

Target Population

Restricted to students admitted to the Paralegal program.

Types of Instruction

Instruction Type	Contact Hours	Credits
Classroom Presentation	54	3

Required Text & Other Materials

No text is required. Students use instructor handouts and Wisconsin Circuit Court Mandated Probate Forms available free online.

Instructional Methods

This course is taught based on lecture, small group discussions and problem solving, case scenario projects, and written examinations.

Methods of Evaluation of Student Performance

Three (3) unit tests are given, each worth 100 points. Students are also required to complete three (3) practical projects, each worth 50 points.

Practical Assignments that Develop Paralegal Competencies

Students complete three (3) practical graded projects and four (4), in-class non-graded practical projects.

Course Objectives

1. Describe the purpose and need for wills as a means of distributing property at death

2. Classify property probate property and non-probate property
3. Differentiate between succession of intestate property and testate property
4. Describe the elements of a valid will, how wills are modified and revoked, and the grounds for a will contest
5. Create checklists for gathering information relevant to estate planning and engage in mock client interviews
6. Describe the probate court system in Wisconsin and the participants in estate administration
7. Describe ethical issues commonly arising in estate planning and estate administration
8. Describe the Wisconsin informal probate procedure and complete the forms used in this type of estate administration (opening, inventory & closing)
9. Describe the various types of summary proceedings used in Wisconsin and the forms used in these types of estate administration

Course Content with Time Allocation

UNIT 1 – Criteria – Unit 1: Related Course Objective #1 (“Describe the purpose and need for wills as a means of distributing property at death”) 4 hours

Use of wills in an estate plan	2 hours
Advance directives as part of the basic estate plan	2 hours

UNIT 2 – Criteria – Unit 2: Related Course Objective #2 (“Classify property probate property and non-probate property”) 8 hours

Probate assets explained	2 hours
Non-probate assets explained	2 hours
Marital Property implications in Wisconsin	4 hours

UNIT 3 – Criteria – Unit 3: Related Course Objective #3 (“Differentiate between succession of intestate property and testate property”) 4 hours

Title implications and beneficiary designations	2 hours
Transfer of testate property at death	1 hour
Transfer of intestate property at death	1 hour

UNIT 4 – Criteria – Unit 4: Related Course Objective #4 (“Describe the elements of a valid will, how wills are modified and revoked, and the grounds for a will contest”) 6 hours

Capacity to make a will	1 hour
Elements of a valid will	3 hours
Revocation of a will	1 hour
Grounds for a will contest	1 hour

UNIT 5 – Criteria – Unit 5: Related Course Objective #5 (“Create checklists or gathering Information relevant to estate planning and engage in mock client interviews”) 1 hour

Use of estate planning checklists 1 hour

UNIT 6 – Criteria – Unit 6: Related Course Objective #6 (“Describe the probate court system in Wisconsin and the participants in estate administration”) 5 hours

Review of the Wisconsin Probate Code 3 hours

Interested parties under Wisconsin law 2 hours

UNIT 7 – Criteria – Unit 7: Related Course Objective #7 (“Describe ethical issues commonly arising in estate planning and estate administration”) 3 hours

Ethical considerations in estate planning 3 hours

UNIT 8 – Criteria – Unit 8: Related Course Objective #8 (“Describe the Wisconsin informal probate procedure and complete the forms used in this type of estate administration (opening, inventory & closing”) 15 hours

Opening an estate under Wisconsin’s informal probate system 4 hours

Estate inventory under Wisconsin’s informal probate system 4 hours

Closing an estate under Wisconsin’s informal probate system 3 hours

Claims procedure 1 hour

Tax considerations 3 hours

UNIT 9 – Criteria – Unit 9: Related Course Objective #9 (“Describe the various types of summary proceedings used in Wisconsin and the forms used in these types of estate administration”) 8 hours

Transfer by Affidavit 3 hours

Summary Settlement 3 hours

Summary Assignment 2 hours