

SYLLABUS
PART I
EDISON COMMUNITY COLLEGE
LEG 211S PROBATE ADMINISTRATION
3 CREDIT HOURS

COURSE DESCRIPTION

Extensive study of decedent's estates with consideration to the various trust options and pre-death decisions that can be arranged. Students will draft wills and trust agreements, complete court forms, and prepare estate tax returns and fiduciary accountings. Prerequisite: LEG 110S and CIT 110S.

COURSE GOALS

The student will:

| Bloom's Level | | Program Outcomes |
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| 3 | 1. Apply Ohio's Statute of Descent and Distribution for decedents who die intestate. | 1 |
| 2 | 2. Explain the statutory requirements for a valid will under Ohio law. | 1 |
| 3 | 3. Determine the rights and elections available to the surviving spouse and how those rights and elections relate to the assets of the decedent and the administration of the decedent's estate. | 1 |
| 3 | 4. Determine the rights of the children of a decedent and know how those rights relate to the assets of the decedent and the administration of the decedent's estate. | 1 |
| 2 | 5. Explain the responsibility of the fiduciary in regard to the heirs at law, creditors, and beneficiaries under the will of the decedent. | 1 |
| 4 | 6. Classify assets in a decedent's name as probate or non-probate assets. | 1 |
| 3 | 7. Complete the steps necessary in a full administration. | 1 |
| 3 | 8. Distinguish between a full administration, release from administration and when each is applicable. | 1 |
| 3 | 9. Complete the steps necessary and forms required for the establishment of a guardianship for a minor and an incompetent. | 1 |
| 3 | 10. Apply the statutes relating to probate issues. | 2 |
| 2 | 11. Explain the mechanics necessary to transfer probate and non-probate assets. | 1 |
| 3 | 12. Articulate the ethical issues that arise in probate and guardianship cases. | 5 |

CORE VALUES

The Core Values are a set of principles that guide in creating educational programs and environments at Edison. They include communication, ethics, critical thinking, human diversity, inquiry/respect for learning, and interpersonal skills/teamwork. The goals, objectives, and activities in this course will introduce/reinforce these Core Values whenever appropriate.

TOPIC OUTLINE

1. Role of Paralegal in Probate Practice
2. Wills
3. Opening an Estate
4. Local Court Rules (Auglaize, Champaign, Darke, Miami, and Shelby Counties)

5. Determination of Assets, Probate and Non-Probate
6. Debts/Claims Against Estate
7. Insolvent Estates
8. Will Contests
9. Estate Tax, Federal and Ohio
10. Income Tax, Decedent's Personal and Estate
11. Transferring Various Types of Assets
12. Fiduciary Accounting
13. Trusts
14. Release From Administration
15. Short Form Release From Administration
16. Guardianships
17. Introduction to Adoptions
18. Ethical Issues