



Western Technical College

10110114 Administration of Estates

Course Outcome Summary

Course Information

Description	Each learner will demonstrate the application of the estate planning process including wills, trusts, estates and advanced directives. Students will learn the path of the probate process with the Wisconsin laws as the primary focus. This course also covers intestacy issues and probate forms and procedures used in probate administration.
Career Cluster	Law, Public Safety, Corrections and Security
Instructional Level	Associate Degree Courses
Total Credits	3
Total Hours	54

Pre/Corequisites

Prerequisite	10110101 Introduction to Paralegal and Ethics
Prerequisite	10110104 Legal Research

Textbooks

Wills, Trusts, and Estate Administration. 9th Edition. Copyright 2022. Walter, Janis L. and Emma Wright Fletcher. Publisher: Cengage Learning. **ISBN-13:** 978-0-357-45219-6. Required.

Success Abilities

1. Cultivate Passion: Expand a Growth-Mindset
2. Live Responsibly: Develop Resilience
3. Live Responsibly: Foster Accountability
4. Refine Professionalism: Improve Critical Thinking
5. Refine Professionalism: Practice Effective Communication

Program Outcomes

1. Apply ethical principles in a legal environment.
2. Process legal documents.
3. Perform legal research.
4. Apply critical thinking skills to address legal issues.

Course Competencies

1. Distinguish between probate and non-probate assets.

Assessment Strategies

- 1.1. Oral Presentation on asset research findings
- 1.2. Written Objective Test

Criteria

You will know you are successful when

- 1.1. you identify and describe asset determination from research
- 1.2. you complete an examination that deciphers the elements of a assets.

Learning Objectives

- 1.a. Determine the types of probate assets including joint tenancy property, and survivorship property.
- 1.b. Determine the types of non-probate assets.

2. Distinguish between marital and individual property under the Wisconsin Uniform Marital Property Act (WUMPA).

Assessment Strategies

- 2.1. Case Study to determine the affect on property using WUMPA.
- 2.2. Written Objective Test

Criteria

You will know you are successful when

- 2.1. you can summarize the elements of marital and individual property by presenting case study findings.
- 2.2. you complete an examination to determine the type of property.

Learning Objectives

- 2.a. Explain the difference between marital and individual peroperty under WUMPA.
- 2.b. List the criteria of WUMPA as it applies to property.

3. Analyze the role of the participants and the probate court structure.

Assessment Strategies

- 3.1. by participating in small and large group discussions
- 3.2. Written Objective Test

Criteria

You will know you are successful when

- 3.1. you properly identify the participants and their duties.
- 3.2. you complete an examination of probate court structure.

Learning Objectives

- 3.a. Describe various estate administration terms including probate, jurisdiction, domicile, venue and administration
- 3.b. Describe the participant roles and responsibilities within the probate structure.
- 3.c. Explain the role of the attorney as a fiduciary in the estate planning process including the duty of care required and the ethical duties of client confidentiality.

4. Prepare a basic will with trust for execution.

Assessment Strategies

- 4.1. by participating in small and large group discussions

4.2. Written Product

Criteria

You will know you are successful when

- 4.1. you prepare a Wisconsin Basic Will with Trust options.
- 4.2. you explain the standards for the execution of a valid will in Wisconsin.
- 4.3. you explain and describe the requirements and process of a will contest.

Learning Objectives

- 4.a. Analyze and determine the elements for a basic will with trust for execution including modification and revocation of the same.
- 4.b. Analyze the process of will contests.

5. Analyze the various Advanced Directives.

Assessment Strategies

- 5.1. Oral Presentation of the elements of Wisconsin Advanced Directives.
- 5.2. Written Objective Test

Criteria

You will know you are successful when

- 5.1. you prepare a Wisconsin Power of Attorney for Health Care and a Wisconsin Durable Financial Power of Attorney.
- 5.2. you complete an examination on the requirements for the Wisconsin Power of Attorney document and other advance directives.
- 5.3. you complete an examination of the components for the Wisconsin Power of Attorney documents.
- 5.4. you participate in group discussion the elements of the various advanced directives.

Learning Objectives

- 5.a. Determine the elements for and prepare a Wisconsin Power of Attorney for Health Care and Durable Financial Power of Attorney.
- 5.b. Analyze fact situations and determine appropriate advance directives.

6. Determine the estate settlement options for Small Estate Settlement and Administration.

Assessment Strategies

- 6.1. Written Objective Test

Criteria

You will know you are successful when

- 6.1. you complete an evaluation to determine the applicability of the small estate administration types to factual situations.
- 6.2. you complete an examination of the criteria for each type of small estate administrations.

Learning Objectives

- 6.a. Analyze the various types of small estate settlements.
- 6.b. Determine that an estate may be settled using one of the Small Estate Settlement Options.

7. Prepare all documents to process an informal probate administration.

Assessment Strategies

- 7.1. Written Product

Criteria

You will know you are successful when

- 7.1. you evaluate a fact situation and determine whether the applicability of an informal probate administration is appropriate.
- 7.2. you prepare all required informal probate documents.

Learning Objectives

- 7.a. Determine that an estate may be settled using informal probate.
- 7.b. Explain the informal probate process to include tax implications.

7.c. Prepare the required documents to administer an estate through the informal probate process.

8. Analyze the various types of trusts including the creating and termination of the same.

Assessment Strategies

- 8.1. by participating in small and large group discussions
- 8.2. Written Objective Test
- 8.3. Written Product

Criteria

You will know you are successful when:

- 8.1. you explain the functions of the various trusts.
- 8.2. you evaluate a fact situation to determine the applicability of the various trusts.
- 8.3. you explain estate settlement under a living trust versus a will.

Learning Objectives

- 8.a. Explore the various types of trusts.
- 8.b. Classify the types of trusts relevant to various fact situations.