



SEPTEMBER 2003
CURRICULUM GUIDELINES

A. Division: **Instructional** Effective Date **September 2003**
 B. Department / **Commerce & Business Admin/** Revision New Course
 Program Area **Office Administration**

If Revision, Section(s)
 Revised:
 Date Last Revised:
 Date of Current Revision:

C: **OADM 329** D: **LEGAL OFFICE PROCEDURES- WILLS AND ESTATES** E: **3**

Subject & Course No.	Descriptive Title	Semester Credits												
F: Calendar Description: This course introduces the student to the role and responsibilities of a Legal Administrative Assistant employed in the field of wills and estates in British Columbia. Students will gain knowledge and practical experience in topics such as Wills and Codicils, Grants of Letters Probate and Letters of Administration with and without a Will, Administration Bonds, transferring the deceased's assets, and winding up estates. This is a "hands-on" course in which the students integrate keyboard, computer, document formatting, and transcription skills, with knowledge of estate law.														
G: Allocation of Contact Hours to Type of Instruction / Learning Settings Primary Methods of Instructional Delivery and/or Learning Settings: Lecture and Seminar Number of Contact Hours: (per week / semester for each descriptor) Lecture 2 hours per week Seminar 2 hours per week Number of Weeks per Semester: 15 weeks x 4 hours per week = 60 hours	H: Course Prerequisites: English 11 with a grade of "C" or better or equivalent and OADM 218 and OADM 256 and OADM 303 with a C+ or better or 45 NWPM													
	I: Course Corequisites: OADM 328													
	J: Course for which this Course is a Prerequisite: OADM 401													
	K: Maximum Class Size: 30													
L: PLEASE INDICATE: <table style="width: 100%; border: none;"> <tr> <td style="border: 1px solid black; width: 30px; text-align: center;"><input type="checkbox"/></td> <td style="padding-left: 10px;">Non-Credit</td> <td></td> <td></td> </tr> <tr> <td style="border: 1px solid black; text-align: center;"><input checked="" type="checkbox"/></td> <td style="padding-left: 10px;">College Credit Non-Transfer</td> <td></td> <td></td> </tr> <tr> <td style="border: 1px solid black; text-align: center;"><input type="checkbox"/></td> <td style="padding-left: 10px;">College Credit Transfer:</td> <td style="padding-left: 20px;">Requested <input type="checkbox"/></td> <td style="padding-left: 20px;">Granted <input type="checkbox"/></td> </tr> </table> <p style="margin-top: 5px;">SEE BC TRANSFER GUIDE FOR TRANSFER DETAILS (www.bccat.bc.ca)</p>			<input type="checkbox"/>	Non-Credit			<input checked="" type="checkbox"/>	College Credit Non-Transfer			<input type="checkbox"/>	College Credit Transfer:	Requested <input type="checkbox"/>	Granted <input type="checkbox"/>
<input type="checkbox"/>	Non-Credit													
<input checked="" type="checkbox"/>	College Credit Non-Transfer													
<input type="checkbox"/>	College Credit Transfer:	Requested <input type="checkbox"/>	Granted <input type="checkbox"/>											

Course Objectives / Learning Outcomes:

M:

The learner has reliably demonstrated the ability to:

1. communicate effectively, using the language, theory and precedents of wills and estates;
2. use the concepts of wills and estates to analyze and solve problems independently and collaboratively;
3. identify the statutes, both provincial and federal, as they apply to wills and estates;
4. translate an understanding of the theory of wills and estates by creating accurate correspondence and documentation relating to preparation of accurate Wills and Codicils, applications made for Letters Probate, Letters of Administration with Will Annexed and Letters of Administration, and transmission and transfer of the deceased's assets;
5. transcribe accurately wills and estates correspondence and documents by applying English, keyboarding and legal office procedure skills;
6. keyboard with speed and accuracy from five-minute timed writings.

N: Course Content:

1. Wills and Codicils

- 1.1 Parts and format of wills and codicils
- 1.2 Formatting, spelling, and terminology
- 1.3 Will clauses
- 1.4 Rules under the Wills Act for making, witnessing and revoking wills

2. Grant of Letters Probate

- 2.1 Gathering information re deceased's estate
- 2.2 Rules regarding notice, execution, and delivery of documents under the Estate Administration Act
- 2.3 Procedures to obtain a grant
 - 2.3.1 open client file
 - 2.3.2 order death certificate
 - 2.3.3 request wills notice search
 - 2.3.4 compile list of deceased's assets and liabilities
 - 2.3.5 complete disclosure document
 - 2.3.6 complete affidavits and renunciations
 - 2.3.7 apply for grant of letters probate

3. Grant of Letters of Administration with Will Annexed

- 3.1 Gathering information re deceased's estate
- 3.2 Rules regarding notice, execution, and delivery of documents under the Estate Administration Act
- 3.3 Procedures to obtain a grant
 - 3.3.1 open client file
 - 3.3.2 order death certificates
 - 3.3.3 request wills notice search
 - 3.3.4 determine who may act as administrator
 - 3.3.5 compile list of deceased's assets and liabilities
 - 3.3.6 complete disclosure documents
 - 3.3.7 complete affidavits, renunciations and consents
 - 3.3.8 apply for grant of letters of administration with will annexed

4. Grant of Letters of Administration

- 4.1 Gathering information re deceased's estate
- 4.2 Rules regarding notice, execution, and delivery of documents under the Estate Administration Act
- 4.3 Procedures to obtain a grant
 - 4.3.1 open client file
 - 4.3.2 order death certificates
 - 4.3.3 request wills notice search
 - 4.3.4 determine who may act as administrator
 - 4.3.5 determine who may inherit in an intestate estate

	<p>4.3.6 compile list of deceased's assets and liabilities</p> <p>4.3.7 complete disclosure documents</p> <p>4.3.8 complete affidavits, renunciations and consents</p> <p>4.3.9 apply for grant of letters of administration</p> <p>5. Transmission and Transfer of Assets</p> <p>5.1 Procedures prior to distribution</p> <p style="padding-left: 20px;">5.1.1 income tax returns and clearance certificates</p> <p style="padding-left: 20px;">5.1.2 notice to creditors</p> <p>5.2 Distribution of Assets</p> <p style="padding-left: 20px;">5.2.1. transfer of real property</p> <p style="padding-left: 20px;">5.2.2. transfer of personal property</p> <p>5.3 Winding up an estate</p> <p style="padding-left: 20px;">5.3.1 preparation of accounts</p> <p style="padding-left: 20px;">5.3.2 passing accounts or obtaining waivers</p> <p style="padding-left: 20px;">5.3.3 releases</p> <p>6. Transcribe Family Law Correspondence and Documents</p> <p>6.1 Apply English spelling and grammar rules to correctly transcribe legal material;</p> <p>6.2 Apply knowledge of civil litigation to transcribe legal material in correct format.</p> <p>7. Timed Writings</p>										
O:	<p>Methods of Instruction:</p> <p>A combination of lectures, guided practices, assignments and case studies will be used. Active learning is an integral part of this course, and emphasis will be placed on a “hands-on” environment to allow students to work both independently and collaboratively to learn and apply procedures and tasks carried on in a legal office. Both learning activities and evaluations will be structured to stress problem solving, accuracy, and working within time constraints.</p>										
P:	<p>Textbooks and Materials to be Purchased by Students:</p> <p>Paige, Sheila and Carole Colvin. <u>Wills and Estates Manual</u>, Latest Ed., Douglas College</p> <p>Paige, Sheila and Carole Colvin. <u>Wills and Estates Precedents</u>, Latest Ed., Douglas College</p> <p>Colvin, Carole and Sheila Paige. <u>Legal Office Procedures Forms II</u>, Latest Ed., Douglas College</p> <p>Dukelow, Daphne A. and Betsy Nuse. <u>Pocket Dictionary of Canadian Law</u>, Latest Ed., Carswell, Barrie, Ontario <i>(Also used in OADM 218, 327, 328, 329)</i></p> <p>Clayton, Dean and Albert Fries. <u>Timed Writings About Careers</u>, Latest Ed., South-Western Publishing Co.</p>										
Q:	<p>Means of Assessment:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Assignments (minimum of 5)</td> <td style="text-align: right;">15%</td> </tr> <tr> <td>Timed Production Evaluations (minimum of 4)</td> <td style="text-align: right;">50%</td> </tr> <tr> <td>Comprehensive Theory Evaluation</td> <td style="text-align: right;">25%</td> </tr> <tr> <td>Keyboarding Speed (average of best three 5-minute timings)</td> <td style="text-align: right;"><u>10%</u></td> </tr> <tr> <td></td> <td style="text-align: right;"><u>100%</u></td> </tr> </table>	Assignments (minimum of 5)	15%	Timed Production Evaluations (minimum of 4)	50%	Comprehensive Theory Evaluation	25%	Keyboarding Speed (average of best three 5-minute timings)	<u>10%</u>		<u>100%</u>
Assignments (minimum of 5)	15%										
Timed Production Evaluations (minimum of 4)	50%										
Comprehensive Theory Evaluation	25%										
Keyboarding Speed (average of best three 5-minute timings)	<u>10%</u>										
	<u>100%</u>										

R: Prior Learning Assessment and Recognition: specify whether course is open for PLAR

This course is open for PLAR.

Course Designer(s): Sheila Paige, Carole Colvin

Education Council / Curriculum Committee Representative

Dean / Director: Jim Sator

Registrar: Trish Angus

© Douglas College. All rights reserved.