



SEPTEMBER 2003 **CURRICULUM GUIDELINES**

A.	Division:	Instructional	Effective Date:	September 2003
B.	Department / Program Area	Commerce & Business Admin/ Office Administration	Revision	New Course X
			If Revision, Section(s) Revised:	New Course
			Date Last Revised:	
			Date of Current Revision:	

C: OADM 429	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, and document formatting with a knowledge of estate law.																	
G: Allocation of Contact Hours to Type of Instruction / Learning Settings Primary Methods of Instructional Delivery and/or Learning Settings: Online instruction Number of Contact Hours: (per week / semester for each descriptor) 4 hours per week Number of Weeks per Semester: 15 weeks x 4 hours = 60 hours	H: Course Prerequisites: English 11 with a grade of "C" or better or equivalent and OADM 425 and OADM 328 and 50 NWPM																
	I: Course Corequisites: Nil																
	J: Course for which this Course is a Prerequisite: Nil																
	K: Maximum Class Size: 24																
L: PLEASE INDICATE: <table border="0" style="width: 100%;"> <tr> <td style="width: 10%;"><input type="checkbox"/></td> <td style="width: 40%;">Non-Credit</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>College Credit Non-Transfer</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>College Credit Transfer:</td> <td>Requested</td> <td><input type="checkbox"/></td> <td>Granted <input type="checkbox"/></td> </tr> </table> <p style="text-align: center;">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"/>													

M: Course Objectives / Learning Outcomes:

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.

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
 - 4.3.6 compile list of deceased's assets and liabilities
 - 4.3.7 complete disclosure documents
 - 4.3.8 complete affidavits, renunciations and consents
 - 4.3.9 apply for grant of letters of administration

5. Transmission and transfer of assets:

- 5.1 Procedures prior to distribution
 - 5.1.1 Income tax returns and clearance certificates
 - 5.1.2 Notice to creditors
- 5.2 Distribution of Assets
 - 5.2.1 Transfer of real property
 - 5.2.2 Transfer of personal property
- 5.3 Winding up an estate
 - 5.3.2 Preparation of accounts
 - 5.3.3 Passing accounts or obtaining waivers
 - 5.3.4 Releases

O: Methods of Instruction:

Communication between instructor and students will be conducted online using WebCT e-mail, discussion, chat utilities, guided practices, assignments, and case studies. Students will 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: Textbooks and Materials to be Purchased by Students:

Paige, Sheila and Carole Colvin. Wills and Estates Manual, Latest Ed., Douglas College

Paige, Sheila and Carole Colvin. Wills and Estates Precedents, Latest Ed., Douglas College

Colvin, Carole and Sheila Paige. Legal Office Procedures Forms II, Latest Ed., Douglas College

Dukelow, Daphne A. and Betsy Nuse. Pocket Dictionary of Canadian Law, Latest Ed., Carswell, Barrie, Ontario (*Also used in OADM 425, 426, 427, 428*)

Q: Means of Assessment:

Assignments (minimum of 5)	15%
Timed Production Evaluations (minimum of 4)	50%
Comprehensive Theory Evaluation	25%
Participation	10%
	<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