



EFFECTIVE: SEPTEMBER 2005 CURRICULUM GUIDELINES

A. Division: **Education** Effective Date: **September 2005**

B. Department / Program Area: **Commerce & Business Admin/
Office Administration** Revision New Course

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

F:	<p>Calendar Description: This is a BCCampus online provincial course. 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 preparation of wills and codicils and the documents necessary to apply grants of Letters Probate and Letters of Administration (with and without a Will), Administration Bonds, transferring the deceased's assets, and winding up estates. Students will prepare documents acceptable to the Probate Registry for filing, followed by transmission and distribution of estates. This is a "ha transcription skills, with knowledge of estate law.</p>		
G:	Allocation of Contact Hours to Type of Instruction / Learning Settings Primary Methods of Instructional Delivery and/or Learning Settings: Online lecture Online lab Number of Contact Hours: (per week / semester for each descriptor) Lecture: 3 Hours Lab: 1 Hour Number of Weeks per Semester: 15 weeks X 4 hours/week = 60 hours/semester	H:	Course Prerequisites: OADM 1430 and OADM 1431
	I:	Course Corequisites: None	
	J:	Course for which this Course is a Prerequisite None	
	K:	Maximum Class Size: 24	
L:	PLEASE INDICATE: <input type="checkbox"/> Non-Credit <input checked="" type="checkbox"/> College Credit Non-Transfer <input type="checkbox"/> College Credit Transfer: SEE BC TRANSFER GUIDE FOR TRANSFER DETAILS (www.bctransferguide.ca)		

M: Course Objectives / Learning Outcomes

The learner has reliably demonstrated the ability to:

1. explain basic principles of trust law and the ways in which they apply to estate work. Explain the purpose of wills and/or codicils;
2. accurately prepare and proofread wills and/or codicils;
3. outline the correct execution procedures for testamentary documents;
4. explain the purpose of the probate and/or administration of estates and the roles of the various parties involved in the estate;
5. list the relevant statutes and their roles in the handling of testamentary documents and estates;
6. utilize legal reference materials, in particular the Rules of Court, along with other sources of information in the processing of estates;
7. translate an understanding of a simple probate by creating correspondence an

- l) Filing a Wills Notice
 - m) Execution of a new Will
 - n) Revocation of a Will
 - o) Execution of a Codicil
 - p) Relocation of a Will or Codicil
 - q) Wills – Forms and Letters
 - r) Wills Instruction Form
 - s) Reporting to the Client
 - t) Wills and Estates Terminology
5. Probate
- a) Obtaining Will
 - b) Identifying Trustee (Executor/Executrix)
 - c) Trustee's Duties:
 - i Gathering Information
 - ii Preserving Assets
 - iii Notifying Beneficiaries and Creditors
 - iv Maintaining Accounts
 - v Preparing Disclosure Document
 - vi. Distribution of Estate
 - d) Documentation Required For Letters Probate.
 - i. Requisition
 - ii. Wills Notice Search
 - iii. Notice of Intention to Apply for Probate
 - iv. Affidavits of Notice Pursuant to Section 112 of the Estate Administration Act
 - v. Disclosure Document
 - vi. Affidavit of the Executor
 - vii. Consents of Creditors
 - e) Post-Application Procedures
 - i. Transmission of assets to the personal representative
 - ii. Preparation and filing of Income Tax Returns
 - iii. Request For Clearance Certificate
 - f) Conditions Met Prior To Distribution
6. Administration With Will Annexed
- a) Obtaining Will
 - b) Appointing A Trustee (Administrator/Administratrix)
 - c) Trustee's Duties:
 - i Gathering Information
 - ii Preserving Assets
 - iii Notifying Beneficiaries and Creditors
 - iv Maintaining Accounts
 - v Preparing Disclosure Document
 - vi. Distribution of Estate
 - vii. Administrative Bonds
 - d) Documentation Required For Administration With Will Annexed
 - i. Requisition
 - ii. Wills Notice Search
 - iii. Notice of Intention to Apply for Administration
 - iv. Affidavits of Notice Pursuant to Section 112 of the Estate Administration Act
 - v. Disclosure Document
 - vi. Affidavit of the Administrator
 - vii. Renunciations and Consents of Creditors
 - viii. Order
 - e) Post-Application Procedures
 - i. Transmission of assets to the personal representative
 - ii. Preparation and filing of Income Tax Returns
 - iii. Request For Clearance Certificate

Q: Means of Assessment

Assignments	5%
Simulation – Probate (Spouse with Adult Children)	10%
Simulation – Probate (Spouse with Minor Children)	15%
Simulation - Administration – with Will	10%
Simulation – Administration – intestacy (Spouse with minor children)	10%
Simulation – Administration – intestacy (No spouse or children)	15%
Quizzes	10%
Final exam	<u>25%</u>
	<u>100%</u>

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

This course is open for PLAR.