



WILLS, TRUSTS, & ESTATES

WTE200 — Wills, Trusts, & Estates, 3.0 hours

PROFESSOR

Cathryn Ensign is a highly respected attorney and experienced Adjunct Professor, teaching Legal Studies and Criminal Justices classes. Cathryn received her Juris Doctorate degree from Cleveland Marshall University of Law and Bachelor of Arts degree in Social Services from Cleveland State University. Cathryn has been practicing law successfully for over thirty years throughout Ohio. Cathryn is admitted to the Ohio, Federal and United States Supreme Court bars. Cathryn has been recognized as one of the Top Attorneys in Cleveland in the areas of Employment Law and Workers' Compensation. Cathryn has been named AV-Preeminent rating from Martindale-Hubbell® Peer Review Ratings™, the gold standard in attorney ratings, having recognized lawyers for their strong legal ability and high ethical standards. Cathryn has taught and mentored young attorneys throughout her career and approximately five years ago, began teaching undergraduate courses in law and criminal justice at local universities and Universities.

Cathryn is also a frequent lecturer and author on a variety of legal topics. Cathryn volunteers as an attorney for Legal Aid and Hospice of the Western Reserve. When not in the Courtroom or the classroom, Cathryn enjoys yoga, reading, cooking and boating on Lake Erie with her husband, Mark and their two golden retrievers, Molly and Marney. Cathryn is the proud stepmother of Brad and Carlie. Cathryn is also an enthusiastic and forever optimistic Cleveland sports fan.

CONTACT INFORMATION

E-mail: censign@lakewood.edu
Cell Phone: 800-517-0857 X 721

ONLINE SUPPORT (IT) AND MOODLE NAVIGATION:

All members of the Lakewood University community who use the University's computing, information or communication resources must act responsibly. Support is accessible by calling 1-800-517-0857 option 2 or by emailing info@lakewood.edu

BOOKS AND RESOURCES

Walter, Janis, and Emma Wright. *Wills, Trusts, and Estate Administration*. (9th Edition). Cengage Learning US, 2021.

EVALUATION METHOD

Graded work will receive a numeric score reflecting the quality of performance.
Course Requirement Summary

- Assignments - Total of 40 Points
- Weekly discussion forums-Total of 80 Points
- Midterm - 20 Points

- Final Exam - 50 Points

GRADING SCALE

Graded work will receive a numeric score reflecting the quality of performance as given above in evaluation methods. The maximum number of points a student may earn is 190. To determine the final grade, the student's earned points are divided by 190.

Your overall course grade will be determined according to the following scale:

A = (90% - 100%)
B = (80% - 89%)
C = (70% - 79%)
D = (60% - 69%)
F < (Below 60%)

ACADEMIC INTEGRITY/ PLAGIARISM:

Cheating (dishonestly taking the knowledge of another person whether on a test or an assignment and presenting it as your work) and plagiarism (to take and pass off as one's own the ideas or writing of another) are a serious issue. While it is legitimate to talk to others about your assignments and incorporate suggestions, do not let others "write" your assignments in the name of peer review or "borrow" sections or whole assignments written by others. We do get ideas from life experiences and what we read but be careful that you interpret these ideas and make them your own.

I am aware that many types of assignments are available on the internet and will check these sources when there is legitimate suspicion.

Penalty is a zero on the assignment. In cases where there is a major or continuous breach of trust, further discipline, such as an "F" in the course, may be necessary.

The major consequence of any form of cheating is damage to your character and the result of trust and respect.

DISABILITY ACCOMMODATIONS

Students who have a disability and wish to request an academic accommodation should contact Jim Gepperth, the Disabilities Services Coordinator and Academic Dean. The student can request an accommodation at any time although it is encouraged to do so early in the enrollment process. The student should complete an accommodation request form which begins a conversation between the school and the student regarding the nature of their disability and an accommodation that would help the student succeed in their program. The school may request documentation regarding the disability to address the accommodation request effectively. The school will communicate to the student the type of accommodation arranged. This process typically follows a team approach, bringing together persons from the academic department (including the instructor) and personnel from other departments as necessary. Additional information on disability accommodations may be found in the Lakewood University Catalog.

Disability Services Email: disabilityservices@lakewood.edu

SUPPLEMENTAL TEXTS

You can use the following resources to assist you with proper source citation.

American Psychological Association Style Guide- https://www.mylakewoodu.com/pluginfile.php/118179/mod_resource/content/1/APA%20Style%20Guide%207th%20edition.pdf

The Purdue OWL website is also a helpful resource for students. Here is a link to the OWL website: https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_formatting_and_style_guide/general_format.html

LIBRARY

Mary O'Dell is the Librarian on staff at Lakewood University

She is available by appointment. You can make an appointment with her by emailing her at modell@lakewood.edu or call at 1-800-517-0857 X 730

You may also schedule a meeting at this link: <https://my.setmore.com/calendar#monthly/r3a761583354923270/01032020>

She can assist you with navigating LIRN, research, citations etc.

SUPPORT

Each student at Lakewood University is assigned a Success Coach. Your Success Coach exists to assist you with academic and supportive services as you navigate your program. They will reach out to you, often, to check-in. Please use the resources they offer.

Student Services is available to assist with technical questions regarding Lakewood University and all services available to you.

1-800-517-0857 option 2
info@lakewood.edu
studentservices@lakewood.edu

CAREER SERVICES

Students are offered Career Services at any point as they journey their academics at Lakewood University.

1-800-517-0857 option 2
careerservices@lakewood.edu

LESSONS

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE	OBJECTIVES
Lesson #1	<ul style="list-style-type: none">This lesson breaks down what wills are and the basics of estate planning.	Study Course Syllabus Read Chapters 1 & 2 Participate in the Discussion Forum Complete Assignment 1 Lesson Evaluation	Assignment 1 upon completion of the lesson	Objective 1
Lesson #2	<ul style="list-style-type: none">This lesson outlines rights and intestate succession.	Read Chapters 3, 4 Participate in 2 Discussion Forum Lesson Evaluation		Objective 3 Objective 7
Lesson #3			Assignment 2 upon completion of the lesson	Objective 2 Objective 5 Objective 6

- This lesson covers the last will and testament and how wills are modeled.
- Read Chapters 5, 6
Participate in the Discussion Forum
Complete Assignment 2
Lesson Evaluation

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE	OBJECTIVES
Lesson #4	<ul style="list-style-type: none"> • This lesson explains family protection, lapses, and ademption as well as trusts. 	Read Chapters 7, 8 Midterm Lesson Evaluation	Midterm upon completion of the lesson	Objective 6

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE	OBJECTIVES
Lesson #5	<ul style="list-style-type: none"> • This lesson identifies specialized trusts, probate courts and uniform laws. 	Read Chapters 9, 10 Participate in 2 Discussion Forums Lesson Evaluation		Objective 6 Objective 7

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE	OBJECTIVES
Lesson #6	<ul style="list-style-type: none"> • This lesson explains the personal representative as well as probating a will and administering an estate. 	Read Chapters 11, 12 Participate in the Discussion Forum Complete Assignment 3 Lesson Evaluation	Assignment 3 upon completion of the lesson	Objective 7

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE	OBJECTIVES
Lesson #7	<ul style="list-style-type: none"> • This lesson covers estate taxes and final choices 	Read Chapters 13, 14 Participate in the Discussion Forum Complete Assignment 4 Lesson Evaluation	Assignment 4 upon completion of the lesson	Objective 4 Objective 7 Objective 8

TITLE	COURSE TOPIC	READINGS/ASSIGNMENTS	DUE
Lesson #8		Complete the Final Exam Request the Next Course Lesson Evaluation THANKS FOR A GREAT CLASS	Final exam upon completion of the lesson

DESCRIPTION

This area of specialty is ideal for legal assistants working with attorneys whose practice consists of some or all probate. This unit of study introduces the legal assistant to the essential requirements of wills, trusts, types of estates and estate taxes. It takes the student on a step-by-step process through all procedures involved in both formal and informal probate. Special emphasis is placed on the roles of various participants in the administration of a probate matter—the lawyer, the personal representative of the estate, the court and the legal assistant. A review of the responsibility that can be delegated to the legal assistant is included. Attention is given to training legal assistants in how to execute many of the probate forms necessary from the commencement through completion of the probate procedure.

Program Objectives

1. Discuss the role of the paralegal in the wills, trusts, and estates law firm
2. Discuss why ownership of property is important.
3. Identify the differences between testate and intestate.

4. Identify estate planning tools and tax consequences.
5. Discuss the importance of having a will.
6. Discuss the drafting of wills and trusts.
7. Discuss the probate process.
8. Identify tax issues associated with probating an estate.

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