

Wayland Mission Statement

Wayland Baptist University exists to educate students in an academically challenging, learning-focused, and distinctively Christian environment for professional success, and service to God and humankind.

Contact Information

Course: LGLS 5318 VC-01 – Wills and Trusts
Campus: WBUOnline
Term/Session: Spring (2) 2021
Instructor: Dr. Jeanette Ahlenius
Office Phone Number: 956.212.0221
WBU Email Address: jeanette.ahlenius@wayland.wbu.edu
Office Hours, Building, and Location: Online
Class Meeting Time and Location: Online

Textbook Information

Required Textbook(s) and/or Required Materials: Wills, Trusts and Estate Administration, Hower, Cengage, 8th edition, 2017, ISBN 9781305506251 (paperback edition).

*The textbook for this course is part of the **Wayland's Automatic eBook** program. You will have access to an eBook and interactive learning material on the first day of class through your Blackboard course site. The cost of this Automatic eBook will be billed directly to your student account when you register for the course. You will be notified via email with access instructions and additional information. If you do not wish to participate in the Automatic eBook program, you will have the first 12 days of class to opt-out of the program (additional details will be outlined in your email instructions). For more information on the Automatic eBook program, visit the Wayland Bookstore [Automatic eBook FAQ](#) page.*

Optional Materials: Reliable internet access.

Course Information

Catalog Description: Examines the law of property transmission through intestate and testate distribution and express and implied trusts. Topics include: execution, alteration, and revocation of wills; rights of immediate family members; contest of wills; creation and elements of express trusts, both private and charitable; rights of beneficiaries; termination of trusts and the duties and liabilities of the trustee; and implied trusts, both resulting and constructive.

There is no prerequisite for this course.

Course Outcome Competencies: Upon completion of this course, students will be able to:

- Describe the benefits and need for a will
- Define and properly use terminology relating to wills, trusts, and probate administration
- Locate, describe, and analyze sources of law relating to wills, trusts, and probate administration
- Understand the role and ethical obligations in wills, trusts, and probate administration
- Understand the purpose of wills and the process of probate administration
- Explain the process related to and documents required for the will drafting and estate planning process including wills, advance directives, powers of attorney, trusts, and other related documents
- Explain the process related to and the documents required for the administration of an estate including probate court documents and filings, tax documents, and other related documents
- Draft a simple will and related documents

Attendance Requirements

WBUonline

Students are expected to participate in all required instructional activities in their courses. Online courses are no different in this regard; however, participation must be defined in a different manner. Student “attendance” in an online course is defined as active participation in the course as described in the course syllabus. Instructors in online courses are responsible for providing students with clear instructions for how they are required to participate in the course. Additionally, instructors are responsible for incorporating specific instructional activities within their course and will, at a minimum, have weekly mechanisms for documenting student participation. These mechanisms may include, but are not limited to, participating in a weekly discussion board, submitting/completing assignments in Blackboard, or communicating with the instructor. Students aware of necessary absences must inform the professor with as much advance notice as possible in order to make appropriate arrangements. Any student absent 25 percent or more of the online course, i.e., non-participatory during 2 or more weeks of an 8-week session, may receive an F for that course. Instructors may also file a Report of Unsatisfactory Progress for students with excessive non-participation. Any student who has not actively participated in an online class prior to the census date for any given session is considered a “no-show” and will be administratively withdrawn from the class without record. To be counted as actively participating, it is not sufficient to log in and view the course. The student must be submitting work as described in the course syllabus. Additional attendance and participation policies for each course, as defined by the instructor in the course syllabus, are considered a part of the university’s attendance policy.

University Policies

Statement on Plagiarism and Academic Dishonesty: Wayland Baptist University observes a zero tolerance policy regarding academic dishonesty. Per university policy as described in the academic catalog, all cases of academic dishonesty will be reported and second offenses will result in suspension from the university.

Disability Statement: In compliance with the Americans with Disabilities Act of 1990 (ADA), it is the policy of Wayland Baptist University that no otherwise qualified person with a disability be excluded from participation in, be denied the benefits of, or be subject to discrimination under any educational program or activity in the university. The Director of Counseling, Career and Disability Services serves as the coordinator of students with disability and should be contacted concerning accommodation request at (806) 291-3765. Documentation of a disability must accompany any request for accommodations.

Accessibility issues with content in WBUonline courses or in Blackboard should be addressed to the WBU accessibility coordinator, Dr. Trish Ritschel-Trifilo, trifilot@wbu.edu or call (806) 291-3745.

Student Grade Appeals: Students shall have protection through orderly procedures against prejudices or capricious academic evaluation. A student who believes that he or she has not been held to realistic academic standards, just evaluation procedures, or appropriate grading, may appeal the final grade given in the course by using the student grade appeal process described in the Academic Catalog. Appeals may not be made for advanced placement examinations or course bypass examinations. Appeals are limited to the final course grade, which may be upheld, raised, or lowered at any stage of the appeal process. Any recommendation to lower a course grade must be submitted through the Vice President of Academic Affairs to the Faculty Assembly Grade Appeals Committee for review and approval. The Faculty Assembly Grade Appeals Committee may instruct that the course grade be upheld, raised, or lowered to a more proper evaluation.

[WBU Catalog](#)

Course Requirements and Grading Criteria

Weekly Reading and Writing Assignments; 2 quizzes; Final Writing Assignment (Will)

Procedure used for computation of Final Grade

1. Responses to Weekly Writing Assignments: 30% of Final Grade.
2. 2 Quizzes over Reading Assignments, averaged together for Quiz Grade: 30% of Final Grade.
3. Final Writing Assignment (Will): 40% of Final Grade.

The University has a standard grade scale:

A = 90-100, B = 80-89, C = 70-79, D = 60-69, F= below 60, W = Withdrawal, WP = withdrew passing, WF = withdrew failing, I = incomplete. An incomplete may be given within the last two weeks of a long term, within the last week of an 8-week session, or within the last two days of a microterm to a student who is passing, but has not completed a term paper, examination, or other required work for reasons beyond the student's control. A grade of "incomplete" is changed if the work required is completed prior to the last day of the next long 16-week term or 8-week session, unless the instructor designates an earlier date for completion. If the work is not completed by the appropriate date, the I is converted to an F.

Tentative Schedule

Week 1 (Begins) March 22, 2021 (Chapter 1) The Concept of Property Related to Wills, Trusts and Estate Administration; (Chapter 2) The Estate Plan and the Purpose and Need for a Will; (Chapter 3) The Law of Succession: Death Testate or Intestate; Writing Assignment

Week 2 March 29, 2021 (Chapter 4) Wills: Validity Requirements, Modification, Revocation and Contests; (Chapter 5) Preparation to Draft a Will: Checklists and the Conference with the Client; (Chapter 6) Final Draft and Execution of a Valid Will; Writing Assignment

Week 3 April 5, 2021 **Quiz 1 (Due Sunday, April 11, 2021, midnight CT)**

Week 4 April 12, 2021 (Chapter 7) The Participants and the Proper Court; (Chapter 8) Personal Representatives: Types, Pre-Probate Duties, and Appointment; (Chapter 9) Probate and Estate Administration); Writing Assignment

Week 5 April 19, 2021 (Chapter 10) Informal Probate Administration; (Chapter 11) Tax Considerations in the Administration of Estates; Writing Assignment

Week 6 April 26, 2021 (Chapter 12) Introduction to Trusts; (Chapter 13) Classification of Trusts, the Living Trust, and Other Special Trusts; (Chapter 14) Estate Planning; (Chapter 15) Long-Term Care; Writing Assignment

Week 7 May 3, 2021 **Quiz 2 (Due Sunday, May 9, 2021, midnight CT)**

Week 8 May 10, 2021 Final Writing Assignment (Will) (**Due Saturday, May 15, 2021, midnight CT**)
