



BROWARD COLLEGE COURSE OUTLINE

LAST REVIEW: 2009-2010
(i.e. 2003-2004)

NEXT REVIEW: 2014-2015
(i.e. 2008-2009)

STATUS: A
(A, I, D)

COURSE TITLE: Probate Practice

COMMON COURSE NUMBER: PLA 1600

CREDIT HOURS: 3

CONTACT HOUR BREAKDOWN
(per 16 week term)

CLOCK HOURS:
(Voc. Course ONLY)

Lecture: **48** Lab:
Clinic: Other:

PREREQUISITE(S): ENC 1101, PLA 1003, and PLA 1104 or Program Manager's approval

COREQUISITE(S):

PRE/COREQUISITE(S):

COURSE DESCRIPTION *(750 characters, maximum):*

This course prepares legal assistants to work effectively under the supervision of a lawyer in the probate and administration of an estate. The Florida Probate Code, trusts, and taxes are studied. Preparation of pleadings is included.

General Education Requirements – Associate of Arts Degree (AA), meets Area(s): Area
General Education Requirements – Associate in Science Degree (AS), meets Area(s): Area
General Education Requirements – Associate in Applied Science Degree (AAS), meets Area(s): Area

UNIT TITLES

1. Introduction and Terminology
2. Formalities Involved in the Execution and Revocation of Wills
3. Restrictions on the Power of Testation
4. Steps in Filing and Administration of a Formal Estate With a Will
5. Steps in Filing a Formal Estate Without a Will
6. Trusts
7. Ethics in Probate Practice

EVALUATION:

Please provide a brief description *(250 characters maximum)* that details how students will be evaluated on the course outcomes.

Student evaluation may include, but is not limited to exams, quizzes, presentations, portfolios, discussions, class participation, attendance, projects, co-ops, practicum, internships, externships, and research reports.

UNITS

Unit 1

General Outcome:

- 1.0 The student shall be able to define basic terms pertaining to testate and intestate estates, as well as the administration of estates.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

1.1 Define key terms that are essential to a basic understanding of the following estates:

1.1.1 Testate estates

1.1.2 Intestate estates

1.1.3 Administration of estates

Unit 2

General Outcome:

- 2.0 The student shall be able to identify the formalities required for the execution and revocation of wills.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 2.1 Explain the formalities that are required for will execution.**
- 2.2 List the primary requirements that exist for the execution of a will, including those that pertain to the following:**
 - 2.2.1 The signature of the testator**
 - 2.2.2 The signature of the witnesses**
 - 2.2.3 The procedure to be followed during will execution**
- 2.3 Describe the various methods for revoking a will, including the following:**
 - 2.3.1 Revocation by written instrument**
 - 2.3.2 Revocation by physical act**
 - 2.3.3 Revocation by operation of law**

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Unit 3

General Outcome:

- 3.0 The student shall be able to discuss the main restrictions on the disposal of property by will.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 3.1 Define and discuss the right of a husband or wife to claim an elective share in the property of the spouse.**
- 3.2 Define and describe the concept of the family allowance.**
- 3.3 Define and describe the concept of homestead, including the qualifying factors that affect homestead status and the manner in which homestead property is treated during the probate of an estate.**

Unit 4

General Outcome:

- 4.0 The student shall be able to describe the factors that determine the necessity and location for probate proceedings involving testate and intestate estates, describe the steps involved in the filing of a testate estate, and prepare documents for the formal filing and administration of a testate estate.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 4.1 Describe the circumstances under which the formal administration of an estate with or without a will is appropriate.**
- 4.2 Explain the factors that bear on the location of testate or intestate probate proceedings.**
- 4.3 List and describe the basic steps involved in the filing and administration of a testate estate and prepare the requisite documents.**

Unit 5

General Outcome:

- 5.0 The student shall be able to describe the basic steps involved in the filing of an intestate estate.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 5.1 List and describe the basic steps involved in the filing of an estate without a will.**

Common Course Number: PLA 1600

Unit 6

General Outcome:

- 6.0 The student shall be able to describe various trusts pertaining to estate planning.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 6.1 Explain the basic components of and parties to a trust.**
- 6.2 Discuss the various classifications of trusts.**

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Unit 7

General Outcome:

- 7.0 The student shall be able to identify the ethical principles pertaining to probate practice.**

Specific Measurable Learning Outcomes:

Upon successful completion of this unit, the student shall be able to:

- 7.1 Discern and apply the ethical guidelines that specifically pertain to the practice of probate and the administration of estates.**