



**EFFECTIVE: SEPTEMBER, 2007**  
**CURRICULUM GUIDELINES**

<b>A.</b> Division:	<b>Education</b>	Effective Date	<b>September 2007</b>
<b>B.</b> Department / Program Area	<b>Commerce &amp; Business Admin/ Office Administration</b>	Revision	<input checked="" type="checkbox"/> New Course <input type="checkbox"/>
		If Revision, Section(s) Revised:	<b>H, I, M, N, P, Q</b>

Subject & Course No.	Descriptive Title	Semester Credits
<b>F:</b>	Calendar Description: <b>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, document formatting, and transcription skills, with knowledge of estate law.</b>	
<b>G:</b>	Allocation of Contact Hours to Type of Instruction / Learning Settings  Primary Methods of Instructional Delivery and/or Learning Settings:	
	<b>H:</b>	Course Prerequisites:  <b>OADM 1218 and OADM 1256 and OADM 1303 with a C+ or better or 45 NWPM</b>
	<b>I:</b>	Course Corequisites:  <b>Nil</b>
	<b>J:</b>	Course for which this Course is a Prerequisite:  <b>OADM 1401</b>

Course Objectives / Learning Outcomes:

**M:**

- g) Clauses in a Will
  - h) Codicil
  - i) Memorandum To Will
  - j) B.C. Supreme Court Rules
    - i. Rule 61
    - ii. Rule 62
  - k) Safeguarding the Will
  - l) Filing a Wills Notice
  - m) Execution of a new Will
  - n) Revocation of a Will
  - o) Execution of a Codicil
  - p) Wills Instruction Form
  - q) Reporting to the Client
  - r) Wills and Estates Terminology
5. Probate with adult beneficiaries
- a) Obtaining Will
  - b) Identifying Trustee (Executor/Executrix)

- vi. Affidavit of the Executor
    - vii. Consents of Creditors
    - viii. Calculation Of Probate Fees
  - f) Post-Application Procedures
    - i. Transmission of assets to the personal representative
    - ii. Preparation and filing of Income Tax Returns
    - iii. Request For Clearance Certificate
  - g) Conditions Met Prior To Distribution
- 7. 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
  - f) Conditions Met Prior To Distribution
- 8. Administration
  - a) Confirming Intestacy
  - b) Appointing A Trustee (Administrator/Administratrix)
  - c) Trustee's Duties:
    - i. Gathering Information
    - ii. Preserving Assets
    - iii. Identifying and Notifying Beneficiaries and Creditors
    - iv. Maintaining Accounts
    - v. Preparing Disclosure Document
    - vi. Distribution of Estate
    - vii. Administrative Bonds
  - d) Documentation Required For Administration
    - 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
- f) Conditions Met Prior To Distribution

**O:** Methods of Instruction:

A combination of lectures, guided practices, assignments and case studies will be used. Active learning is an integral part of this course, and emphasis will be placed on a “hands-on” environment to allow students to 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:

Yip, Titus. Introduction to Wills and Estates. DFC Publications. (Latest Edition)

Clayton, Dean and Albert Fries. Timed Writings About Careers, Latest Ed., South-Western Publishing Co.

**Q:**