



Advanced Paralegal Certificate Program - B107 180 hours – Choose 3 specialty areas:

This course is designed for students who have successfully completed the Paralegal Assistant Certificate and wish to continue their studies and specialize in advanced topics, such as:

1. [Civil Litigation](#)
2. [Family Law](#)
3. [Criminal Law](#)
4. [Business and Corporate Law](#)
5. [Real Estate Law](#)
6. [Practical Bankruptcy Law](#)
7. [Personal Injury and Torts](#)
8. [Wills, Trusts, and Estates](#)

Delivering courses electronically allows you maximum flexibility when accessing and completing your career program. You can choose to read lessons on-screen, download the study guide for later use, or print out your own hard copy immediately. In the Online Student Center, courses can be completed on the computer using our own course management system. You receive all the program materials by mail upon enrollment, then log into the Online Student Center with a username and password. Once logged on, you can access your study guides, take exams, and contact your instructors and fellow students.

Our study guides are set up in an easy-to-use PDF format, which allow graphically sophisticated screen displays to be viewed in large format. In addition, you have resources such as online testing with instantaneous results; access to student records, payment history and grade history; chat and discussion boards; online student support; and web resources.

Advanced Paralegal Course Civil Litigation - 45 hours

Description

The Civil Litigation course offers established paralegals specialized knowledge for a litigation law firm. This course contains a balanced mix of legal theory and practical legal skills designed to inform as well as challenge the student. The text emphasizes federal litigation practice and forms, and also incorporates common state practice and forms. With the many forms, letters, memos, charts, and diagrams presented, this text will become a valuable reference for paralegals in the litigation field. It discusses the paralegal's role in assisting the attorney before, during, and after a trial, including investigating and gathering evidence, participating in discovery, drafting the complaint, preparing witnesses for depositions, assisting in the completion of interrogatories, preparing the trial notebook, preparing witnesses for trial, and post trial practice, including drafting the appellate brief.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

Objectives

- a. To describe the basic civil litigation process.
- b. To identify skills of a litigation paralegal and tasks performed by a litigation paralegal.
- c. To describe the various courts within the federal and state court systems.
- d. To define and identify types of jurisdiction.
- e. To identify the paralegal's role in the case investigation and the gathering of evidence.
- f. To define and describe the responses to the initial pleading.
- g. To outline the steps involved in drafting, serving, and amending the complaint.



- h. To explain the procedures for making and opposing a motion.
- i. To describe the paralegal's role in the discovery process.
- j. To compare and contrast the different types of depositions.
- h. To describe the advantages and disadvantages of interrogatories.
- k. To describe the duties a litigation paralegal might perform regarding settlement.
- l. To describe the litigation paralegal's function at trial.
- m. To explain how to draft the appellate brief.

Lesson 1: Civil Litigation 1

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 1
Defines civil litigation; covers the different types of lawsuits, procedural versus substantive law, and the sources of the law; discusses the role of the litigation paralegal and the skills required of a litigation paralegal.
- B. Chapter 2
Covers the courts and litigation; discusses the federal and state court systems; defines and discusses jurisdiction and venue.
Examination

Lesson 2: Civil Litigation 2

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 3
Discusses determining the existence of a cause of action and time limitations; covers the feasibility of a lawsuit and turning down a case; discusses the ethical considerations in accepting a case and the ethical considerations after accepting a case.
- B. Chapter 4
Covers the client interview; discusses how to locate fact witnesses and elusive defendants; presents techniques for interviewing witnesses; covers methods for locating and preserving evidence; discusses expert witnesses.
- C. Chapter 5
Covers initial pleadings, parties to the lawsuit, and jurisdiction and venue; discusses the claim or cause of action and demand for relief; discusses how to draft, file, service, and amend the complaint.
Examination

Lesson 3: Civil Litigation 3

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 6
Discusses responding to the initial pleading, the types of answers, and drafting the answer; covers the counterclaims, cross-claims, and third-party complaints; discusses the legal challenges to the complaint.
- B. Chapter 7
Covers motions, preliminary injunctions, and temporary restraining orders.
Examination



Lesson 4: Civil Litigation 4

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 8
Covers the nature of discovery, the extent of allowable discovery, the duty of mutual disclosure under Rule 26, and cooperating with discovery.
- B. Chapter 9
Covers the deposition, including the nature of the oral deposition, the paralegal's role before, during, and after the oral deposition, and special types of depositions.
- C. Chapter 10
Covers drafting interrogatories and drafting answers to interrogatories.
Examination

Lesson 5: Civil Litigation 5

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 11
Discusses the physical or mental examination; covers filing a motion for compulsory examination and the requirements for granting the motion for compulsory examination; discusses the paralegal's role in physical and mental examinations.
- B. Chapter 12
Covers documents, including the request for documents, the protection of documents, requesting the production of documents, responding to the request for documents, organizing and indexing the documents after production, and inspecting property.
- C. Chapter 13
Explains the request for admissions, including drafting and responding to the request for admissions.
Examination

Lesson 6: Civil Litigation 6

Textbook: *Civil Litigation*, third edition, by Peggy Kerley, Joanne Banker Hames, J.D., and Paul A. Sukys, J.D., West Legal Studies (Thomson Learning), 2001, ISBN: 0766826694

- A. Chapter 14
Covers the settlement, including settlement offers, agreements, and releases; discusses dismissals, consent decrees, and the distribution of funds; explains alternative dispute resolution.
- B. Chapter 15
Covers trial techniques, including preliminary preparation for trial, the preparation of witnesses, exhibits, and briefs; discusses coordinating trial logistics and the preliminary steps in the trial process; covers the jury process, the trial, and the paralegal's role at trial.
- C. Chapter 16
Discusses posttrial practice, including posttrial motions, the preliminary steps in the appeal, the appellate brief, coordinating the oral arguments, and final procedures.
Examination

Course Materials

Textbook: *Civil Litigation*, 3rd Edition, 2001, by Peggy Kerley, Joanne Banker Hames, and Paul A. Sukys. Custom published paperback edition.



Advanced Paralegal Course Family Law - 45 hours

Description

The Family Law course uses articles, cases, and examples to describe a paralegal's role in matters of family law. Paralegals will be able to assist attorneys as they draft premarital and cohabitation agreements, help clients start or end their marriages, set up a mutually agreeable child custody arrangement, clarify paternity, adopt a child, litigate tort cases, and more. This course includes up-to-date information on same-sex relationships, the enforcement of child support orders, the legal status of frozen embryos, the confidentiality of adoption records, and other family law issues currently in the news.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

After completing this course, you will have a better understanding of:

- the paralegal's role in a family law firm
- how to help draft a premarital agreement
- how to help draft a cohabitation agreement
- what legal issues come up prior to marriage
- how to determine if someone is married
- the different types of marriages
- the issue of same-sex marriage
- the grounds for an annulment
- conflict of law issues related to annulments
- consequences of an annulment decree
- no-fault grounds for divorce
- fault grounds for divorce
- how a judicial separation works
- jurisdictional issues involved in divorces
- pre-trial and trial matters in a divorce case
- alternative dispute resolution
- enforcement of divorce judgments
- how to help draft a separation agreement
- how alimony is determined
- how property division is determined
- how separation agreements are modified
- how child custody and visitation rights are determined
- what to expect from a parent v. parent custody case
- what to expect from other types of custody cases
- the laws prohibiting child snatching
- how child support is determined
- how child support is enforced
- the tax consequences of separation and divorce
- the legal rights of women, including employment rights and reproductive rights
- illegitimacy rights
- how to help with a paternity proceeding
- the legal status of children, especially those who have been abused or neglected
- the different kinds of adoption
- how to help with an adoption procedure



- the new science of motherhood, including frozen embryos
- the surrogate controversy
- intrafamily torts
- vicarious liability

Lesson 1: Beginnings

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 1
Provides an introduction to family law; illustrates the struggle for equality between the sexes; discusses the federalization of family law; explains the contract dimension of family law; overviews science and law; covers the emerging recognition of gay rights
- B. Chapter 2
Explains premarital agreements, including disclosure of assets, fairness and unconscionability, public policy, and the need for independent counsel; shows how to interview for and draft premarital agreements; introduces cohabitation agreements, including express, implied, and quasi contracts; covers trust, partnership, and joint venture; explains the putative spouse doctrine; shows how to interview for and draft cohabitation agreements
- C. Chapter 3
Covers legal issues prior to marriage, such as a breach of the promise to marriage, intentional infliction of emotional distress, gifts, and restraining contracts; explains how a marriage is defined; contrasts ceremonial, covenant, common law, and putative marriages; considers same-sex relationship issues, especially in Hawaii and Vermont, as well as the case of *Lawrence v. Texas*

Examination

Lesson 2: Endings

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 4
Explains annulment, divorce, and legal separation; distinguishes between void and voidable; explains who can sue; clarifies the possible grounds for annulment, especially those relating to the legal capacity to marry and intent to marry; explains marriage-evasion statutes; discusses the consequences of annulment, including alimony, child support, inheritance, tax return status, and more
- B. Chapter 5
Covers divorce, beginning with no-fault and fault grounds for divorce; explains judicial separation and separate maintenance; introduces the divorce procedure, beginning with the concept of domicile and jurisdiction; discusses such pre-trial matters as pleadings and discovery and moving through trial procedures; describes alternative dispute resolution; covers the divorce judgment and how it is enforced; ends with a discussion of civil unions

Examination



Lesson 3: Separations

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 6
Begins with an overview of separation agreements and litigation, including negotiation factors; explains public policy and collusion, capacity to contract, duress and fraud, and consideration in the separation agreement; discusses alimony payments and property division, including the effect of bankruptcy, remarriage, and death; covers modification of the separation agreement as well as arbitration and reconciliation
- B. Chapter 7
Explains how child custody is presented in the separation agreement; covers contested custody, including court discretion, legal preferences, witnesses and wishes of the child; explains visitation issues; discusses court cases involving the biological parent vs. the psychological parent; shows what happens when there are jurisdiction or kidnapping problems

Examination

Lesson 4: Obligations

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 8
Begins by explaining the Uniform Interstate Family Support Act; discusses the cost of college and the second family; covers the modification and enforcement of support orders, including nonsupport prosecution, license or passport denial, Federal Tax Refund Offset Program, and credit clouding
- B. Chapter 9
Covers the role of tax law in the bargaining process; explains about deductible alimony and the recapture rule; looks at property division and transfers; discusses innocent spouse relief and the marriage penalty

Examination

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 10
Explains how the legal rights of women have changed; looks at contracts and conveyances; covers the death of a husband; discusses rights related to a woman's name and credit; explains a woman's rights in the workplace; covers sexuality and reproductive rights; provides sensitivity training related to the battered wife and marital rape
- B. Chapter 11
Discusses illegitimacy as it relates to inheritance, testate distribution, and other issues; looks at the matter of artificial insemination; explains legitimation and paternity
- C. Chapter 12
Considers the legal status of children, including the age of majority and emancipation; explains issues involving contracts; considers a minor's property and earnings; clarifies domicile issues; looks at estates and education rights; ends with a frank discussion of neglect, abuse, and delinquency

Examination



Lesson 6: Adoption and Other Family Matters

Textbook: *Family Law, The Essentials, Second Edition*, by William P. Statsky, West Legal Studies (Thomson Delmar Learning), 2004, ISBN: 1-4018-4827-3

- A. Chapter 13
Explains the various kinds of adoption, including who may adopt and who may be adopted; covers the adoption procedure, from the petition to the placement; clarifies the consequences of adoption; illustrates the need for confidentiality; contrasts an equitable adoption with a wrongful one
- B. Chapter 14
Covers the new science of motherhood, including such hot topics as in vitro fertilization, the status of frozen embryos, stem-cell research, and surrogacy contracts
- C. Chapter 15
Discusses intrafamily torts; explains what is done in cases of wrongful life, birth, pregnancy, or adoption; considers loss of consortium or services; explains such other torts as alienation of affections, criminal conversation, enticement of spouse or child, and seduction; ends by explaining the vicarious liability of family members

Examination

Course Materials

Textbook: *Family Law, The Essentials, 2nd Edition, 2004*, by William P. Statsky. Paperback edition.

Advanced Paralegal Course Criminal Law - 45 hours

Description

The predominance of criminal law cases within the legal system has caused an increasingly high demand for paralegals trained in this field. This course prepares students to participate, as criminal law paralegals, in pretrial, trial, and post trial preparations and procedures. It discusses the criminal justice system and its components as well as the paralegal's multifaceted role in this system. The course also covers the specific elements of crime, including homicide, assault and battery, arson, burglary, embezzlement and extortion, among many others. Students are challenged to apply their legal reasoning skills to realistic case scenarios, analysis problems and other exercises. Ethical concerns and performance standards are also emphasized throughout the course.

Criminal law is the area of law that names behaviors and actions that are subject to prosecution and penalty by the government, and the process through which justice is administered within the legal system. Criminal law is one of the most interesting areas of law. Its predominance within the legal system has caused an increasingly high demand for the services of criminal law paralegals, which has, in turn, created a multitude of job opportunities for paralegals specializing in criminal law. The Criminal Law Paralegal course prepares students for entry-level positions within law firms, government offices, corporate legal departments, and various other agencies dealing with the prosecution of crime within the United States.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

- a. To understand criminal law and the criminal legal system of the United States.
- b. To explain the paralegal's role in the prosecution of crimes and the administration of justice in criminal proceedings.
- c. To identify the components of and classification of various criminal acts.



- d. To explain the elements of crimes against property, public order and safety, property, and justice and administration, as well as inchoate and organized crimes.
- e. To explain different types of defenses and their elements.
- f. To identify the paralegal's role in the intake procedure in a prosecutor's office and in drafting a complaint.
- g. To understand the legal elements of search and seizure, including the legal use of warrants and the preparation of warrants.
- h. To discuss a defendant's rights concerning confession.
- i. To explain and understand the paralegal's role in pretrial procedures from initial appearance to pretrial conference.
- j. To describe the paralegal's duties and tasks during the trial procedure.
- k. To understand terms and forms of sentencing and punishment procedures.

Lesson 1: Criminal Law 1

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 1
Introduces students to criminal law and the legal system; explains classification of crimes; discusses punishment, retribution, deterrence, and rehabilitation for crimes; introduces an overview of crime within the United States.
- B. Chapter 2
Discusses administration of justice and the paralegal's role within the prosecution of crimes; introduces law enforcement and prosecutorial agencies; explains the criminal court system; introduces the professional ethics and other professional considerations within the practice of criminal law and as a criminal law paralegal.
- C. Chapter 3
Discusses the components of a crime; introduces the classification of crimes; explains the role of mens rea and motive within classification; introduces the concepts of causation and complicity; discusses vicarious and corporate liability.

Examination

Lesson 2: Criminal Law 2

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 4
Presents the elements of a crime; discusses the facets of crimes against persons such as homicide, assault and battery, civil rights violations, sexual battery, criminal abuse, and kidnapping, false imprisonment, and custodial interference; discusses the aspects of crimes against habitation such as arson, vandalism, and burglary.
- B. Chapter 5
Discusses the elements of crimes against property such as larceny, embezzlement, fraud, and extortion; explains the factors of crimes against public order and safety such as terrorism, disorderly conduct, and riot; discusses aspects of crimes against public morals, including nonviolent sexual conduct, gambling, and drug offenses; explains elements of crimes against justice and public administration such as bribery, perjury, and resisting arrest.

Examination



Lesson 3: Criminal Law 3

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 6
Discusses inchoate crimes such as attempt, conspiracy, and solicitation; discusses organized crimes such as those performed by racketeering influenced and corrupt organizations (RICO), continuing criminal enterprise (CCE) offenders, and criminal gangs.
- B. Chapter 7
Introduces students to types of defenses; defines constitutional and statutory defenses such as freedoms of religion, expression, and assembly; introduces types of justification, including self-defense and resisting unlawful arrest; introduces excuses such as duress, necessity, and insanity; explains the defenses of missing elements and syndromes.

Examination

Lesson 4: Criminal Law 4

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 8
Explains the steps of the intake procedure in a prosecutor's office and a paralegal's role in that procedure; discusses the paralegal's interview with the client; explains the elements of a prosecutor's decision to charge; describes duties involved in drafting a complaint, as well as preparing a summons and warrant; explains docket tracking.
- B. Chapter 9
Discusses Fourth Amendment (search and seizure) rights; outlines requirements for a warrant, as well as exceptions to these requirements; discusses consent searches; introduces issues concerning electronic surveillance and the Patriot Act; discusses the legal use of secret agents, as well as the exclusionary rule.

Examination

Lesson 5: Criminal Law 5

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 10
Discusses issues involved in confessions and pretrial identification procedures; introduces the Fifth Amendment privilege against self-incrimination; explains *Miranda's* role in arrest, confession, and interrogation; outlines the paralegal's role in confession; discusses eyewitness identification procedures such as line-ups and photo identifications.
- B. Chapter 11
Outlines pretrial procedures from a defendant's initial appearance in court to the preliminary hearing; defines types of bail and pretrial release services; outlines terms of pretrial detention; explains the paralegal's role in the pretrial interview of the defendant and of witnesses; introduces other preliminary investigation and preparation duties of defense and prosecution teams; outlines the events of a preliminary hearing.



- C. Chapter 12
Outlines pretrial procedures from grand jury and indictment to the pretrial conference; explains the roles and powers of a grand jury; highlights the paralegal's role in assisting the prosecution or defense in preparation for the grand jury; explains the information and arraignment; introduces the process of discovery and the paralegal's role in this process; discusses pretrial motions and notice of defenses; explains plea bargaining; discusses the pretrial conference.

Examination

Lesson 6: Criminal Law 6

Textbook: *Criminal Law and Procedure: A Systems Approach*, third edition, by James W.H. McCord and Sandra L. McCord, West Legal Studies (Thomson, Delmar Learning), 2006, ISBN-13: 978-1-4018-6564-1, ISBN-10: 1-4018-6564-X

- A. Chapter 13
Discusses the pretrial rights of a plaintiff and defendant; outlines the paralegal's role in preparing for trial, including preparation of the trial notebook, client, witnesses, and various trial materials; discusses the paralegal's role in the trial procedure, including preparation for voir dire and for the opening statement; discusses the elements of a trial from the presentation of the prosecution's case to post trial motions
- B. Chapter 14
Explains sentencing and terms of serving a sentence; describes different forms of punishment, including capital punishment, incarceration, fines, restitution, forfeiture, and probation; outlines sentencing statutes, guidelines, and procedure; introduces the process of appeal; explains the habeas corpus procedure.

Examination

Course Materials

Textbook: *Criminal Law and Procedure: A Systems Approach*, 3rd Edition, 2006, by James W.H. McCord and Sandra L. McCord. Paperback edition.

Advanced Paralegal Course Business and Corporate Law - 45 hours

Description

The Business and Corporate Law course prepares paralegals for more responsibilities in a business law firm. It discusses important topics related to business law, including traditional and online dispute resolution, sales and leases, warranties, product liability, consumer law, e-contracts, negotiable instruments, corporations, financing, investor protection, online securities offerings, real and personal property, agency and employment, and international law in a global economy. The text that accompanies this course provides a solid coverage of the core business law topics. It also uses summarized cases to help students understand the legal topics presented. This text meets with the AACSB curriculum requirements.

Outlines

- a. To describe historical and constitutional foundations related to business law.
- b. To describe the relationship between business ethics and the law.
- c. To identify the basic elements and classifications of contracts.
- d. To describe the obligation of the parties involved in sales and lease contracts.



- e. To explain how the Uniform Computer Information Transactions Act (UCITA) affects e-contracts.
- f. To identify the requirements that must be met for an instrument to be negotiable.
- g. To define and explain a security interest.
- h. To outline and describe some major forms of business organization used by entrepreneurs in the United States.
- i. To identify and describe the express and implied powers of corporations.
- j. To describe the duties agents and principals owe to each other.

Business Law 1

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

- A. Chapter 1
Covers the common law tradition, precedent, and when a court might depart from precedent; discusses the difference between remedies at law and remedies in equity; covers the Bill of Rights and the freedoms guaranteed by the First Amendment.
- B. Chapter 2
Defines business ethics and discusses the relationship between business ethics and the law; explains how duty-based ethical standards differs from outcome-based ethics; covers corporate social responsibility and the difference between maximum profits and optimum profits.
- C. Chapter 3
Covers judicial review and jurisdiction; explains the difference between a trial court and an appellate court; covers pleadings and discovery and how online forums are being used to resolve disputes.
Lesson 1 Examination

Lesson 2: Business Law 2

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

- A. Chapter 4
Covers tort, tort law, and the four elements of negligence; defines intellectual property and the traditional laws protecting it.
- B. Chapter 5
Covers the categories of crime and the elements that must exist before a person can be held liable for a crime; discusses the constitutional safeguards protecting people accused of crimes.
- C. Chapter 6
Covers contracts and the elements necessary for a valid contract; discusses the requirements of an offer/acceptance and the elements of consideration.
- D. Chapter 7
Covers contracts in greater detail; discusses some exceptions to the rule that a minor can disaffirm any contract and fraudulent misrepresentation.
Lesson 2 Examination



Lesson 3: Business Law 3

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6\

- A. Chapter 8
Discusses the difference between an assignment and a delegation; discusses the factors that indicate that a third-party beneficiary is an intended beneficiary; explains the difference between compensatory damages and consequential damages; covers equitable remedies.
- B. Chapter 9
Covers sales and leases; explains how Article 2 and Article 2A of the UCC differ; discusses when a title passes, risk of loss, and at what point the buyer acquires an insurable interest in goods.
- C. Chapter 10
Covers sales and leases in more detail; explains the respective obligations of the parties under a contract for the sale or lease of goods; discusses the perfect tender rule and options available to the non-breaching party when the other party to a sales or lease contract repudiates the contract before performance; covers remedies available for breach of contract.

Lesson 3 Examination

Lesson 4: Business Law 4

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

- A. Chapter 11
Covers warranties, product liability, and consumer law; discusses the factors that determine whether a seller's or lessor's statement constitutes an express warranty or merely "puffing;" covers defenses to liability in a product liability lawsuit, when advertising can be deemed deceptive, and the major federal statutes providing consumer protection.
- B. Chapter 12
Covers e-contracts; discusses important clauses offerors should include when making offers to form e-contracts; covers shrink-wrap agreements, electronic signatures, and the Uniform Electronic Transaction Act (UETA).
- C. Chapter 13
Covers negotiable instruments; discusses the requirements for attaining HDC status; discusses a bank's responsibilities regarding stale checks, stop-payment orders, and forged or altered checks; covers e-money.
- D. Chapter 14
Covers security interests; discusses how priority disputes among creditors are decided; discusses the various remedies available to creditors, and how and when creditors use these remedies to collect debts; outlines the typical steps in a bankruptcy proceeding and the Bankruptcy Code.

Lesson 4 Examination



Lesson 5: Business Law 5

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

- A. Chapter 15
Covers the major forms of business organization used by entrepreneurs in the United States; discusses joint ventures and franchises.
- B. Chapter 16
Covers corporations; explains express and implied powers of corporations and the duties of corporate directors and officers; explains the difference between a corporate merger and a corporate consolidation.
- C. Chapter 17
Covers financing, investor protection, and online securities offerings; discusses the two major statutes regulating the securities industry, insider trading and the features of state security laws, including their application in an online environment.
- D. Chapter 18
Discusses the difference between an employee and an independent contractor and how agency relationships arise; discusses the duties agents and principals owe to each other; covers the employment-at-will doctrine and the federal statutes governing working hours and wages and health and safety in the workplace.

Examination

Lesson 6: Business Law 6

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

- A. Chapter 19
Covers employment discrimination and the difference between disparate-treatment discrimination and disparate-impact discrimination; covers the remedies available under Title VII of the 1964 Civil Rights Act; discusses what federal acts prohibit discrimination based on age and discrimination based on disability.
 - B. Chapter 20
Covers antitrust law; defines and discusses monopoly; explains the type of activities prohibited by the Sherman Act and the Clayton act and the agencies of the federal government that enforce the federal antitrust laws.
 - C. Chapter 21
Covers real property and environmental law; explains how ownership rights in real property can be transferred and the major federal statutes that regulate environmental pollution.
 - D. Chapter 22
Covers personal property, bailments, and insurance; explains the difference between real property and personal property; covers the three elements of a bailment, and the clauses typically included in insurance contracts.
 - E. Chapter 23
Covers international law in a global economy; discusses the principle of comity and the act of state doctrine; discusses the Foreign Sovereign Immunities Act of 1976 and in what circumstances U.S. antitrust laws can be applied extraterritorially.
- Lesson 6 Examination



Course Materials

Business Law Today: The Essentials, sixth edition, by Roger LeRoy Miller and Gaylord A. Jentz, South-Western (Thomson), 2003, ISBN: 0-324-12096-6

Advanced Paralegal Course Real Estate Law - 45 Hours

Description

Representation of real estate clients is a major area of practice for many law firms, and opportunities for real estate paralegals are numerous. The Real Estate Law course discusses different forms of ownership of real property, aspects of real estate finance and title insurance, and special circumstances surrounding the ownership of condominiums and cooperatives. This course also explains the real estate paralegal's role in assisting the attorney with the reading and preparation of various real estate documents including encumbrances, easements, licenses, contracts, deeds, titles, closings, surveys, land descriptions, and leases. The text that accompanies this course includes a number of cases to illustrate important points of law and to give students experience in reading actual cases and applying actual disputes to chapter material. The Real Estate Paralegal course prepares students for entry-level positions with law firms that deal in real estate cases.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

Objectives

- a. To define real property and differentiate between types of ownership and estates.
- b. To describe the different forms of concurrent ownership.
- c. To discuss encumbrances, easements, and licenses.
- d. To outline the basic requirements for a legal contract, explain the remedies for a breach of contract, and identify the parties to a contract.
- e. To explain how to prepare a deed.
- f. To identify the paralegal's role in certain aspects of real estate finance.
- g. To discuss title examinations, and explain the paralegal's role in ordering and preparing title examinations.
- h. To describe the importance of title insurance and discuss how to prepare an insurance commitment and review a title insurance policy.
- i. To outline the parts of a real estate closing and discuss the closing process.
- j. To provide samples of real estate documents including affidavits, deeds, closing statements and other documents, and explain how to complete each document.
- k. To explain and differentiate between the condominium and cooperative form of property ownership.
- l. To describe different methods of surveying and land description and explain how to prepare a legal description of land.
- m. To discuss commercial leases and lease provisions, including the remedies for a default of the lease available to both the landlord and the tenant.

Lesson 1: Real Estate Law 1

Textbook: *Essentials of Practical Real Estate Law*, third edition, by Daniel F. Hinkel, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 1-4018-1471-9

A. Chapter 1

Distinguishes between real property and personal property; explains how ownership of property is acquired; identifies and explains the estates of ownership of real property.



- B. Chapter 2
Discusses the four types of concurrent ownership of real property; explains the rights, duties, and liabilities of common owners.
- C. Chapter 3
Identifies and explains public and private encumbrances on real property; defines easement and describes several types of easements on real property; describes the purpose of a license and explains when a license is and is not effective.

Examination

Lesson 2: Real Estate Law 2

Textbook: *Essentials of Practical Real Estate Law*, third edition, by Daniel F. Hinkel, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 1-4018-1471-9

- A. Chapter 4
Explains the requirements of a valid contract, the remedies for a breach of contract, and the role of a real estate broker; identifies the contents of a real estate contract for both a residential and a commercial property; discusses how to review and prepare a real estate contract.
- B. Chapter 5
Differentiates between types of deeds; outlines the basic requirements of a valid deed; explains how to prepare a deed.

Examination

Lesson 3: Real Estate Law 3

Textbook: *Essentials of Practical Real Estate Law*, third edition, by Daniel F. Hinkel, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 1-4018-1471-9

- A. Chapter 6
Discusses how to prepare a promissory note and a guaranty; explains different security instruments including mortgages, deeds of trust, and security deeds; describes different types of foreclosure; identifies remedies for a borrower against foreclosure.
- B. Chapter 7
Explains title examinations; distinguishes between the three types of recording statutes; discusses the process of a title examination; describes how to use the grantor-grantee indices, the plat index, and other items required for a title examination.

Examination

Course Material

Textbook: *Essentials of Practical Real Estate Law*, 3rd Edition, 2004, by Daniel F. Hinkel. Paperback edition.

Practical Bankruptcy Law - 45 hours

Description

The Practical Bankruptcy Law course is designed to prepare paralegals for specialized positions with law firms dealing in bankruptcy cases. This course provides the building blocks of bankruptcy law by explaining bankruptcy cases from the perspective of the debtor, the trustee, and the creditor and discusses the special rules and procedures that must be followed in each type of case. This course also explains how cases are commenced, converted, dismissed, and closed. The text that accompanies this course covers all the basic, underlying concepts of bankruptcy law and the procedural rules governing bankruptcy cases. Each topic discussed within the text is developed for effective use by a beginning paralegal, yet the discussions are of sufficient sophistication to keep the attention of an experienced paralegal. The world of bankruptcy law offers a variety of opportunities to paralegals trained in this field.



Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

Objective

- a. To provide a history and overview of bankruptcy
- b. To discuss the Bankruptcy Code and the Bankruptcy Rules
- c. To explain the role of the paralegal in a bankruptcy practice
- d. To establish the building blocks of bankruptcy law
- e. To identify different sources of law, explain how to perform legal research, and give the basics of legal writing
- f. To discuss bankruptcy litigation and appeals, from establishing jurisdiction and venue to appealing a case
- g. To discuss how to prepare for and begin a bankruptcy case
- h. To explain how a Chapter 7 bankruptcy case works from the debtor's perspective
- i. To describe a Chapter 7 bankruptcy case from a trustee's perspective
- j. To distinguish between Chapter 12 and Chapter 13 bankruptcy cases and explain how these cases work for family farmers and individual reorganizations
- k. To discuss Chapter 11 bankruptcy cases and explain how complex reorganizations work
- l. To describe a bankruptcy case from the perspective of secured creditors, unsecured creditors, and lessors
- m. To explain how taxes are determined, prioritized, and paid in bankruptcy cases
- n. To discuss the systems used to file bankruptcy cases and obtain bankruptcy court documents electronically, and describe the future role of paralegals

Lesson 1: Bankruptcy Law 1

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5

- A. Chapter 1
Provides an overview of bankruptcy; introduces and defines many terms associated with bankruptcy law; explains the history of bankruptcy and discusses recent amendments and reforms.
- B. Chapter 2
Summarizes the Bankruptcy Code; discusses the different chapters of bankruptcy; lists the rules governing bankruptcy practice and describes the bankruptcy procedures; identifies and describes bankruptcy crimes.
- C. Chapter 3
Discusses the paralegal's role in a bankruptcy practice; distinguishes between the different parties represented by law firms in bankruptcy cases; explains the role of an independent paralegal.

Examination

Lesson 2: Bankruptcy Law 2

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5

- A. Chapter 4
Provides the building blocks of bankruptcy law; explains automatic stays, executory contracts, and unexpired leases; describes the processes of assumption and rejection; discusses how the Uniform Commercial Code and other laws are related to bankruptcy law; explains the different types of real estate ownership and financing.
- B. Chapter 5
Explains how to perform legal research in a bankruptcy case; identifies different sources of law; provides the basics of legal writing; discusses some of the new computer-aided legal research tools.

Examination



Lesson 3: Bankruptcy Law 3

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5

- A. Chapter 6
Describes bankruptcy litigation and appeals; explains jurisdiction, venue, and removal in bankruptcy cases; explains the different types of proceedings; discusses appeals in bankruptcy cases; states the importance of local court rules.
- B. Chapter 7
Discusses how to begin a bankruptcy case; explains how to decide if a case should be filed; describes how to prepare a case; explains the commencement of a bankruptcy case; provides sample forms that are filed in bankruptcy cases and explains how they should be filed.

Examination

Lesson 4: Bankruptcy Law 4

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5

- A. Chapter 8
Describes a Chapter 7 bankruptcy case from the debtor's perspective; defines discharge and explains the procedure for obtaining a discharge; discusses reaffirmations, exemptions, and redemptions; describes the process for converting or dismissing a case.
- B. Chapter 9
Describes a Chapter 7 bankruptcy case from the trustee's perspective; explains the process of collecting the estate; describes how an estate is liquidated; explains the employment and compensation of professionals in a bankruptcy case; discusses how to distribute the estate; provides a description of the procedures for closing a case.

Examination

Lesson 5: Bankruptcy Law 5

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5

- A. Chapter 10
Discusses Chapter 12 and Chapter 13 bankruptcy cases which involve family farmers and individual reorganizations; explains the process of converting, dismissing, and closing these types of cases.
- B. Chapter 11
Describes Chapter 11 bankruptcy cases that involve complex reorganizations; explains the management of a Chapter 11 debtor; discusses how to administer a Chapter 11 case; explains financing operations, cash collateral, and the use, sale, and lease of property; discusses the importance of confirming a plan to reorganize; identifies the special rules for Chapter 11 bankruptcy cases; describes the processes for converting, dismissing, and closing Chapter 11 cases.

Examination

Lesson 6: Bankruptcy Law 6

Textbook: *Practical Bankruptcy Law for Paralegals*, third edition, by Pamela K. Webster, Richard E. Boyer, and David Lauren, West Legal Studies (Delmar, Thomson Learning), 2004, ISBN: 0-7668-2856-5



- A. Chapter 12
Discusses bankruptcy cases from the perspective of both secured and unsecured creditors; explains the procedures for filing an involuntary petition; discusses the appropriate way to file a proof of claim form; explains a lessor's right of reclamation; describes how to obtain relief from the automatic stay.
- B. Chapter 13
Discusses taxes in bankruptcy and explains how taxes are determined; identifies the priority of taxes; identifies and describes taxes that are nondischargeable; explains the payment of taxes in different types of bankruptcy cases.
- C. Chapter 14
Discusses electronic filing in bankruptcy cases; explains how to use the CM/ECF filing system and the PACER system for retrieving court documents; provides a list of software and hardware needed to utilize these systems; identifies some of the security and privacy issues related to electronic filing; discusses the future role of the bankruptcy paralegal.

Examination

Course Materials

Textbook: *Practical Bankruptcy Law for Paralegals*, 3rd Edition, 2004, by Pamela K. Webster, Richard E. Boyer and David Lauren. Paperback edition.

Advanced Paralegal Course Personal Injury and Torts - 45 hours

Description

Tort law is in the arena of law that is primarily responsible for trying to make citizens whole after they have been injured by the wrongs (torts) of others. Lawsuits concerning torts are numerous and there are many opportunities for paralegals specializing in this field. The Personal Injury/Torts course introduces students to tort law by discussing the scope, definitions, elements, and purpose of torts. It also discusses specific torts such as battery, assault, negligence, strict liability, and torts within and against family members. The text that accompanies this course provides an overview of the law of torts with a focus on the paralegal role in tort litigation. The case studies in this text offer insight into some of the current "hot topic" legal issues. The Torts Paralegal course prepares students for entry-level positions within law firms dealing in torts.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

Objectives

- a. To define tort law and list its categories and purposes.
- b. To explain the role of foreseeability in tort law.
- c. To explain the difference between battery and assault.
- d. To define and explain strict liability.
- e. To identify the elements and defenses of negligence.
- f. To discuss the role of products liability in the media.
- g. To define and identify torts against and within the family and torts connected to the land.
- h. To explain defamation and related terms.
- i. To discuss misrepresentation, tortious interference, and tort defenses.
- j. To define workers' compensation and identify covered diseases and injuries.



Lesson 1: Torts 1

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

- A. Chapter 1
Introduces students to torts; discusses purposes, elements, and categories of torts; introduces causation.
- B. Chapter 2
Discusses foreseeability in tort law; explains foreseeability spectrum and the objective standard; phrasing the foreseeability; foreseeability determining “formula;” reviews steps to determine foreseeability.
- C. Chapter 3
Discusses act, person, intent, harmful or offensive contact, consent and privilege.
- D. Chapter 4
Introduces students to the tort of assault; discusses the role of act and apprehension, and assault and civil rights.

Examination

Lesson 2: Torts 2

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

- A. Chapter 5
Discusses false imprisonment and false arrest.
- B. Chapter 6
Discusses misuses of legal proceedings, such as malicious prosecution and criminal proceedings.
- C. Chapter 7
Explains the infliction of emotional distress, such as pain and suffering; explains the conditions under which the plaintiff can sue for emotional distress.
- D. Chapter 8
Discusses the tort of conversion, also called trespass to chattels; explains the damages the plaintiff may receive under this tort and when interference is serious enough for conversion.

Examination

Lesson 3: Torts 3

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

- A. Chapter 9
Defines strict liability and gives the three main categories; discusses strict liability for abnormally dangerous conditions or activities; explains defenses for strict liability.
- B. Chapter 10
Introduces students to negligence; explains negligence and breach of duty and negligence and insurance.
- C. Chapter 11
Discusses duty, the first element of negligence; discusses protection for the good Samaritan.



D. Chapter 12

Discusses breach of duty, the second element of negligence; explains the importance of reasonableness and unreasonableness.

Examination

Lesson 4: Torts 4

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

A. Chapter 13

Discusses the third element of negligence, proximate cause; explains cause in fact and weight of evidence.

B. Chapter 14

Discusses the fourth element of negligence, damages; explains the difference between compensatory, nominal, and punitive damages; defines joint tortfeasor.

C. Chapter 15

Covers defenses to negligence, including comparative negligence, contributory negligence, last clear chance, and assumption of the risk.

D. Chapter 16

Discusses products liability and product liability in the media; explains the categories of defects; explains the role of warranty, misrepresentation, and express warranty in products liability.

Examination

Lesson 5: Torts 5

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

A. Chapter 17

Discusses survival and wrongful death; explains survival of torts unrelated to death.

B. Chapter 18

Covers torts within and against the family; identifies and explains torts derived from other torts, prenatal injuries, wrongful life, birth, pregnancy, and wrongful adoption.

C. Chapter 19

Introduces students to torts connected with land, including trespass to land, nuisance, and traditional negligence liability.

D. Chapter 20

Covers defamation; defines and explains the defamatory statement, extrinsic facts, falsity of the statement, of and concerning the plaintiff, publication, republication, and cyberspace defamation; also discusses damages, privilege, SLAPP suits, and "veggie libel."

Examination



Lesson 6: Torts 6

Textbook: *Essentials of Torts*, second edition, by William P. Statsky, West Legal Studies (Delmar, Thomson Learning), 2001, ISBN: 0-7668-1157-3

- A. Chapter 21
Covers invasion of privacy and its four related torts: intrusion, appropriation, public disclosure of private fact, and false light.
- B. Chapter 22
Discusses misrepresentation and tortious interference; discusses interference with contract relations; interference with prospective advantage; and tortious interference with employment; also covers disparagement.
- C. Chapter 23
Discusses additional tort defenses, such as consent in tort law, self-help privileges, sovereign immunity and official, charitable, and intrafamily tort immunity.
- D. Chapter 24
Covers workers' compensation, including its statutes and covered injuries and diseases.

Examination

Course Materials

Textbook: *Essentials of Torts*, 2nd Edition, 2001, by William P. Statsky. Paperback edition.

Advanced Paralegal Course Wills, Trusts and Estates - 45 hours

Description

The Wills, Trusts, and Estates Advanced Paralegal Course uses articles, cases, and examples to describe a paralegal's role in the administration of wills, trusts, and estates. This course will prepare paralegals to assist attorneys as they plan estates, explain rights, draft wills, set up trusts, appoint personal representatives, probate wills, file estate taxes, and represent clients in probate court. The text that accompanies this course is written in a style that is easy to understand, with legal jargon and unnecessary verbiage avoided. State-by-state information is presented clearly with the use of maps, tables, and case studies. Charts and boxed cases help to make complex topics easier to understand.

Tuition includes textbook, exclusive Study Guide and access to the Online Student Center. 12 month access.

Outline

- a. To describe the benefits of having a will
- b. To explain the implications of dying without a will
- c. To list the categories of facts needed for estate planning
- d. To distinguish between real property and personal property
- e. To describe the different kinds of non probate property
- f. To determine how property is distributed through the law of intestate succession
- g. To describe the legal requirements for executing, changing, and revoking a will
- h. To understand typical paragraphs in a will



- i. To explain laws enacted to protect family members
- j. To list advantages and disadvantages of different kinds of trusts
- k. To describe some of the uniform laws
- l. To list the titles and duties of a personal representative
- m. To understand different types of probate proceedings
- n. To learn about the tax forms a personal representative must file
- o. To explain the law on advance directives and anatomical gifts

Lesson 1: Estate Planning Fundamentals

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 1
Describes the benefits of having a will; shows the risks in writing one's own will; explains the implications of dying without a will
- B. Chapter 2
Explains the purpose of estate planning; describes the members of the estate planning team; lists the four categories of facts that must be gathered in the estate planning process; identifies the principal tools available to the estate planner; describes some postmortem estate planning devices

Examination

Lesson 2: Property Rights and Intestacy

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 3
Describes the "bundle of rights" concept of property; defines probate property; distinguishes between real property and personal property; describes the different kinds of non-probate property
- B. Chapter 4
Contrasts the law that governs the passing of real property with the law that governs the passing of personal property when someone dies intestate; describes when property passes according to the law of intestate succession; states the share that a surviving spouse inherits under this law; identifies other people who will inherit under this law; shows the disposition of property owned by people who die intestate survived by no spouse or ascertainable kindred

Examination

Lesson 3: Wills

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 5
Describes the legal requirements for executing a will; explains the methods of changing and revoking wills; identifies possible ground for contesting a will
- B. Chapter 6
Discusses the guidelines for drafting a will; identifies the opening paragraphs of a will; explains the main paragraphs of a will; describes the fiduciary and tax provisions of a will; identifies the ending paragraphs of a will; explains letters of instruction



- C. Chapter 7
Explains the laws that have been enacted for the protection of family members; distinguishes between lapsed legacies and ademption.

Examination

Lesson 4: Trusts

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 8
Defines a trust; names the parties to a trust; compares the methods of creating a trust; describes the different kinds of express and implied trusts
- B. Chapter 9
Describes a Totten trust; shows when to use a spendthrift trust and when to use a sprinkler trust; compares assorted marital deduction trusts and the use of each; describe several types of charitable trusts and the use of each; explains the use of life insurance trust as a way to save taxes

Examination

Lesson 5: Will Administration

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 10
Shows the courts that have jurisdiction in the field of probate law; identifies the office that is responsible for the care and custody of probate records; describes uniform laws that deal with probate law
- B. Chapter 11
Explains who, in a given case, should petition the court for appointment as a personal representative; lists the duties of a personal representative; distinguishes among the titles of personal representatives and shows when each is used; explains the reasons for the removal of a personal representative
- C. Chapter 12
Explains why probate is needed in particular cases; outlines the steps necessary when formal probate proceedings are undertaken; lists the steps that are used for informal probate proceedings; explains the procedures when ancillary administration is undertaken

Examination

Lesson 6: Death and Taxes

Textbook: *Administration of Wills, Trusts, and Estates*, third edition, by Gordon Brown, J. D., West Legal Studies (Thomson Delmar Learning), 2003, ISBN: 0-7668-5251-4

- A. Chapter 13
Explains the initial steps that must be taken by a personal representative with regard to the decedent's taxes; identifies the outcome that must be included in the decedent's final income tax return and fiduciary income tax return; explains the occasion, due date, and form used for filing a federal estate income tax return; differentiates between gross estate and taxable estate; shows how to compute a hypothetical estate tax



- B. Chapter 14
Summarizes the law as it applies to the right to refuse medical treatment; describes the types of advance directives; explains the methods of making anatomical gifts; shows who has the right to possession of the decedent's body and the duty of burial

Examination