AUBURN
UNIVERSITY OUTREACH

OFFICE OF PROFESSIONAL AND
CONTINUING EDUCATION

Office of Professional & Continuing Education
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Auburn University is an equal opportunity educational institution/employer.

Education & Training Plan
Wills, Trusts & Estates Specialist Certificate Program with Externship

Student Full Name: _____

Start Date: _____ End Date: _____

Program includes National Certification & an Externship Opportunity
Mentor Supported

Wills, Trusts & Estates Specialist Certificate Program with Externship
Course Code: AU-L-WTE
Program Duration: 6 Months
Course Contact Hours: 375
Student Tuition: $3,799

The Wills, Trusts & Estates Specialist
The intergenerational transfer of wealth is controlled by both statutory and common law principles applicable to a particular jurisdiction. Competing views of the individual's freedom of disposition and state power both to channel and to tax property have led to an interesting and complex array of legal devices and institutions that govern the proper way to gift certain types of property, trusts and other instruments of ownership. From statutory intestacy and elective share provisions, wills, and trusts to planning for incapacity, future interests in property, powers of appointment, life insurance, and introductory aspects of trust and estate administration, this course examines the everyday use of laws that govern how these instruments can be passed on from generation to generation as intended by the original or subsequent owners.

The Wills, Trusts & Estates Specialist Program
This program explores the ins and outs of the legal and ethical requirements necessary to develop and administer an estate plan. Students will be introduced to highly-specialized legal vocabulary pertaining to these particular legal fields, as well as relevant substantive and procedural law that govern wills, trusts and estates. For those students looking toward law school or who are interested in the paralegal profession, this program offers an incredibly useful and realistic look into the actual work that lawyers and legal professionals do every day. As part of this course, students will produce an estate planning and estate administration portfolio of relevant documents that thoroughly covers the wills, trusts, and estates legal specialty.

Education and National Certifications
- Students should have or be pursuing a high school diploma or GED.
- There are no state approval and/or state requirements associated with this program.
- There is a National Certification exam available to students who successfully complete this program:
  - ➢ **Microsoft Office Specialist (MOS) Certification Exam**.

Program Objectives
At the conclusion of this program, students will be able to:
- ➢ Examine estate planning considerations
- ➢ Analyze the rules of intestate succession
- ➢ Describe the requirements for a valid will
- ➢ Prepare a living will and powers of attorney
- ➢ Prepare a basic will
- ➢ Examine the requirements of trusts and supporting documents
- ➢ Describe the duties of a personal representative and procedure for appointment
- ➢ Create the initial estate administration documents
- ➢ Prepare an inventory document
- ➢ Examine creditor claims
- ➢ Describe tax law as it relates to estate planning
- ➢ Prepare final accounting and estate closing documents
- ➢ Describe estate administration concerns
- ➢ Use Microsoft Office

National Certification
Upon successful completion of this Auburn University program, students would be eligible to sit for the Microsoft Office Specialist (MOS) exam. Although there are no state approval, state registration or other state requirements for this program, students who complete this program at Auburn University will be prepared and are eligible to sit for this national certification exam. Students who complete this program are encouraged to complete the externship option with their program. Students who complete this program can and do sit for the MOS national certification exams and are qualified, eligible and prepared to do so. Auburn University works with each student to complete the exam application and register the student to take their national certification exam.

Externship / Hands on Training / Practicum
Although not a requirement, once students complete the program, they have the ability to participate in an externship and/or hands on practicum so as to practice the skills necessary to perform the job requirements of a professional in this field. Students will be assisted with completing a resume and/or other requirements necessary to work in this field. All students who complete this program are eligible to participate in an externship and will be placed with a participating organization near their location. Auburn University works with national organizations and has the ability to place students in externship opportunities nationwide.

Auburn University contact: If students have any questions regarding this program including national certification and externships**, they should call Shavon Williams of Auburn University at | 334-844-3108 or via email at szw0063@auburn.edu**

Note: No refunds can be issued after the start date published in your Financial Award document.

About Auburn University!

Welcome to Auburn University! Auburn University was established in 1856 as the East Alabama Male College, 20 years after the city of Auburn's founding.

OUR MISSION: The Office of Professional and Continuing Education (OPCE) makes the educational resources of Auburn University available for non-credit education programs and conferences designed to promote lifelong learning, regardless of age, interest, or location. Our programs fall into five general categories: Professional Development, Certificate Programs, Personal Enrichment, Summer Youth Programs, and Conferences.
http://www.auburn.edu/mycaa

Auburn University and Pearson Education
The Auburn University's Office of Professional and Continuing Education eLearning programs were developed in partnership with Pearson Education to produce the highest quality, best-in-class content and delivery necessary to enhance the overall student learning experience, boost understanding and ensure retention. Pearson Education is the premier content and learning company in North America offering solutions to the higher education and career training divisions of colleges and universities across the country aimed at driving quality education programs to ensure student success. Please visit us at **www.pearson.com**.

About Pearson Education
Welcome to Pearson. We have a simple mission: to help people make more of their lives through learning. We are the world's leading learning company, with 40,000 employees in more than 80 countries helping people of all ages to make measurable progress in their lives. We provide a range of education products and services to institutions, governments and direct to individual learners, that help people everywhere aim higher and fulfil their true potential. Our commitment to them requires a holistic approach to education. It begins by using research to understand what sort of learning works best, it continues by bringing together people and organizations to develop ideas, and it comes back round by measuring the outcomes of our products.

The Wills, Trusts & Estates Specialist Program Detailed Student Objectives:

OVERVIEW OF ESTATE PLANNING
- Describe the reasons for preparing an estate plan
- Describe the different categories of property
- Describe the types of property ownership
- Give examples of probate and non-probate property
- Examine the basic rules of jurisdiction and venue for executing a will
- Define "intestate" and "testate"
- Identify sources of estate law

INTESTATE SUCCESSION
- Give examples of what can happen if a person dies without a will
- Summarize laws regarding intestate succession
- Define lineal, collateral, consanguinity, and affinity relationships
- Differentiate between per stirpes and per capita
- Describe the escheat process

BASIC ESTATE PLANNING AND THE WILL
- Describe valid and invalid forms of gifts
- Describe the purpose of a self-proving affidavit
- Describe the procedure for modifying an existing will
- Describe how an existing will can be revoked

POWER OF ATTORNEY, POWER OF ATTORNEY HEALTH CARE, AND LIVING WILL
- Describe the difference between a power of attorney and a durable general power of attorney
- Draft a health care power of attorney
- Draft a living will

DRAFTING, EXECUTION, AND STORAGE OF BASIC WILLS
- Prepare a checklist for the initial estate planning conference
- Employ basic will terminology
- Draft a will
- Describe the procedure for executing a will
- Identify ethical considerations associated with various will storage options

TRUSTS
- Outline the requirements of a trust
- Define beneficiary
- Identify the role and duties of the trustee
- Differentiate between types of trusts
- Explain how a trust can terminate

TIPS FOR DRAFTING TRUSTS
- Discuss the legal significance of trust clauses and their application
- Summarize trust drafting tips

OVERVIEW OF ESTATE ADMINISTRATION
- Summarize the procedure to appoint someone as a personal representative of an estate
- Describe the role of the personal representative
- Summarize the powers and duties of the personal representative
- Describe the purpose of a personal representative bond
- Give examples of circumstances that can lead to termination of a personal representative

ISSUANCE OF LETTERS OF APPOINTMENT
- Outline the procedure to administer a decedent's estate
- Prepare a checklist for the initial probate client conference
- Draft the initial estate administration documents
- Explain the process for obtaining letters of appointment
- Draft a Letter of Appointment

INVENTORY AND APPRAISAL
- Describe the appraisal process
- Outline the procedure for identifying assets for the inventory
- Draft an inventory document

CREDITORS' CLAIMS
- Summarize the procedure for notifying creditors of the claim procedure
- Draft a Notice to Creditors
- Analyze the creditor's options in pursuing collection against the estate
- Outline the estate response options to creditors who have presented claims
- Explain the rationale for creditor preference rules
- List the order of creditor preference

TAX LAW AS IT RELATES TO WILLS, TRUSTS, AND ESTATES
- Summarize tax saving devices used in estate planning
- Identify relevant aspects of tax law implicated in the probate process
- Describe how tax law applies to a decedent's final tax return

ESTATE, INHERITANCE, AND FIDUCIARY TAXES
- Describe estate tax
- Define inheritance tax
- Identify how a fiduciary tax is triggered

FINAL ACCOUNTING AND ESTATE CLOSING
- Describe the concept of the final accounting
- Outline the steps involved in closing the estate
- Draft a final account document
- Draft documents that close the estate

ADDITIONAL ESTATE ADMINISTRATION PROCEDURE
- Identify will contest issues
- Outline small estate administration
- Summarize ancillary administration issues

Note: This program can be completed in 6 months. However, students will have online access to this program for a 24-month period.

MICROSOFT OFFICE Module

- Use an integrated software package, specifically the applications included in the Microsoft Office suite
- Demonstrate marketable skills for enhanced employment opportunities
- Describe proper computer techniques for designing and producing various types of documents
- Demonstrate the common commands & techniques used in Windows desktop
- List the meaning of basic PC acronyms like MHz, MB, KB, HD and RAM
- Use WordPad and MSWord to create various types of documents
- Create headings and titles with Word Art
- Create and format spreadsheets, including the use of mathematical formulas
- Demonstrate a working knowledge of computer database functions, including putting, processing, querying and outputting data
- Define computer terminology in definition matching quizzes
- Use the Windows Paint program to alter graphics
- Use a presentation application to create a presentation with both text and graphics
- Copy data from one MS Office application to another application in the suite
- Use e-mail and the Internet to send Word and Excel file attachments
- Demonstrate how to use the Windows Taskbar and Windows Tooltips
- Explain how copyright laws pertain to data and graphics posted on the Internet
- Take the college computer competency test after course completion
- Follow oral and written directions and complete assignments when working under time limitations

Note: Although the Microsoft Office Module is not required to successfully complete this program, students interested in pursuing free Microsoft MOS certification may want to consider completing this Microsoft Office Module at no additional cost.

System Requirements:

Windows Users:
- Windows 8, 7, XP or Vista
- 56K modem or higher
- Soundcard & Speakers
- Firefox, Chrome or Microsoft Internet Explorer

Mac OS User:
- Mac OS X or higher (in classic mode)
- 56K modem or higher
- Soundcard & Speakers
- Apple Safari

iPad Users:
- Due to Flash limitations, eLearning programs are NOT compatible with iPads

Screen Resolution:
- We recommend setting your screen resolution to 1024 x 768 pixels.

Browser Requirements:
- System will support the two latest releases of each browser. When using older versions of a browser, users risk running into problems with the course software.
- Windows Users: Mozilla Firefox, Google Chrome, Microsoft Internet Explorer
- Mac OS Users: Safari, Google Chrome, Mozilla Firefox

Suggested Plug-ins:
- Flash Player
- Real Player
- Adobe Reader
- Java