UNIVERSITY OF BALTIMORE SCHOOL OF LAW
PLANNING FOR FAMILY AND SENIORS
PROFESSOR ANGELA VALLARIO
Fall 2015

Class Schedule:	Wednesday 6:00pm – 9:00pm
Room	ALC 109
Office:	ALC Room 1013
Office Hours:	Wednesday before class and by appointment on TWEN
Phone Number:	410-837-4619
Fax Number:	410-837-4560
E-mail:	avallario@ubalt.edu
TWEN Home Page:	Each student must register for TWEN and use an e-mail address that is regularly checked. Password: textbook

REQUIRED TEXT:
Vallario, *Fundamentals of Estate Planning*

THE COURSE OBJECTIVE:
This 3-credit course in which estate planning documents will be prepared for families with modest assets (those not subject to the Federal Estate Tax). Topics will include wills, trusts, powers of attorney and advance medical directives.

PREPARATION, ATTENDANCE AND GRADING:
Preparation:
Students must be prepared for class. Students are strongly encouraged to participate in class discussions. Voluntary class participation will only increase your grade. Lack of preparation when called upon may reduce your grade in this course.

Attendance policy:
Prompt attendance at class meetings is a course requirement. The University of Baltimore School of Law Attendance Policy applies to this course.

Projects

You will be required to prepare various projects in accordance with Maryland law as a requirement of this course. The Projects will constitute your grade in this course as described below. You will receive a 5% grade reduction for each day or portion thereof that any project is handed in late. The Graded Estate Plans will be posted on TWEN on the date the Estate plan is due.

Professional Observation Project. Each student will be required to participate in some event outside the law school and report back to the class his or her experience in the form of a presentation. The date of your presentation will be randomly assigned. For example you can attend a hearing in Orphans Court, or attend an estates and trust program. The requirements of the assignment will be posted.

Each person must complete his or her Personal Estate Plan. This could include a will, trust, power of attorney and/or advance medical directive. If you have a particular reason you do not wish to prepare and execute an estate plan for yourself, please see me and I will give you an alternate assignment. You should select a partner to conduct your estate plan execution. You must meet with me for final approval before you execute the documents in class.

Grading:

Professional Observation	10%
Interview Skills	15%
Personal Estate Plan	15%
Mock Client (Ramono)	15%
Client #1	15%
Client #2	15%
Client #3	15%

Date			**Estate Plan Due**
8/19	**Class 1** **Ch. 1** **Form 3-1** **Ch. 3** **58-66**	**Overview of Course** **Client Interview** 1. Form Law firms 2. Law Firm Assignment 3. Personal Estate Plan 4. Mock Client Interview assignments	**Be prepared to conduct the Mock Interview on page 60 and ask additional questions**
8/26	**Class 2** **Ch. 3** **Ch. 1** **7-17** **Form 5-1**	**Client Interview** **Ancillary Documents** ●The Power of Attorney ●Advanced Medical Directive	Ramono Estate plan
9/2	**Class 3** **Ch. 2** **Form 3-1**	**Interview of Client #1** **Law Firm #1** Client # 1 Discussion/Forums	

9/9	**Class 4**		Client #1 Graded Estate Plan Entire class
9/16	**Class 5 Ch. 4 77-88**	**Client #1 Critique Execution Ceremony and Safekeeping of documents**	Execution of Personal Estate Plans
9/23	**Class 6**	**Execution Ceremony Client #1 Law Firm #1**	Client #1 Final Estate Plan Law Firm #1
9/30	**Class 7**	**Interview Client #2 Law Firm #2 Client #2 Discussion/Forums**	
10/7	**Class 8**		Client #2 Graded Estate Plan Entire Class
10/14	**Class 9**	**Critique Client #2**	Execution of Personal Estate Plans
10/21	**Class 10**	**Execution Ceremony Client #2 Law Firm # 2**	Client #2 Final Estate Plan Law Firm #2
10/28	**Class 11**	**Professional Observation Presentations**	Sign up to present your professional observation
11/4	**Class 12**	**Interview Client #3 Law Firm #3 Client #3 Discussion/Forums**	
11/11	**Class 13**	**Client #3 Critique**	Execution of Personal Estate Plans
11/18	**Class 14**	**Execution Ceremony Client #3 Law Firm #3**	Client #3 Final Estate Plan Law Firm #3