Course: Trusts and Estates  
LAW 758  
Sections 311 and 412

Instructor: Professor Angela Vallario  
ALC 1013  
410-837-4619  
avallario@ubalt.edu  
OFFICE HOURS Monday and Wednesday 5:00-6:00 pm and by appointment

Days/Time: Monday and Wednesday  
Day Section 3:00- 4:15pm  
Evening Section: 7:45-9:30pm

Location: Check the Law School class schedule for the room assignment.

Course Description:  
Intestate succession; wills, including formalities of execution, revocation and revival; incorporation by reference and related doctrines; problems of construction and interpretation, including class gifts, rule against perpetuities; non-probate transfers, including inter vivos and causa mortis gifts; probate and administration of estates; trusts, their nature, creation, modification and termination; rights of beneficiaries; express, resulting and constructive trusts; honorary trusts.

Course Materials:  

Student Learning Outcomes:  
At the successful completion of this course students will be able to:  
1. Read and understand estates and trusts statutes and common law for Maryland, UPC and other selected jurisdictions.  
2. Comprehend trusts and estates terminology.  
3. Identify and distinguish probate and non-probate assets.  
4. Calculate the intestacy shares for a spouse, descendants and collateral heirs.  
5. Understand the process of a client interview for the preparation of a will, power of attorney and advance medical directive.  
6. Assess strengths and weaknesses of estate planning options.  
7. Explain the requirements for preparing a valid will and trust.  
8. Address different types of trusts and the ramifications there of.  
9. Apply the rules of the estate administration process to a hypothetical fact pattern.  
10. Collaboratively solve trusts and estates legal problems.
Grades:
Ancillary Documents        5%
Intestate Succession    5%
Wills        5%
Trusts        5%
Exam     80%
TOTAL                                                                            100%

Four Assessments:
You will be required to submit 4 assessments during the semester each worth 5% of your grade in the course. All assessments must be submitted through TWEN. No late assignments will be accepted.

1. Ancillary Documents
2. Intestate Succession
3. Wills
4. Trusts

Exam:
There will be a 3-hour closed book, CUMULATIVE final exam. You may bring a calculator to the final exam. Exam-like Assessments are posted on the TWEN page under “Practice Exams”.

Course Expectations:
American Bar Association Accreditation Standards establish guidelines for the amount of work students should expect to complete for each credit earned. Students should expect approximately one hour of classroom instruction and two hours of out-of-class work per week for each credit earned in a class, or an equivalent amount of work for other academic activities, such as simulations, externships, clinical supervision, co-curricular activities, and other academic work leading to the award of credit hours.

CLASS PREPARATION, PARTICIPATION, AND PROFESSIONALISM.
Students must be prepared for class. Excellent participation may increase your grade in the course whereas lack of preparation is likely to reduce your grade in this course up to a half-letter grade. Every student is expected to be prepared for all problems in the assigned readings.

Attendance:
Prompt attendance at class meetings is expected. An attendance sheet will be distributed and it is your responsibility to initial the attendance sheet. The Honor Code applies with regard to initialing the attendance sheet. Class attendance is a primary obligation of each student whose right to continued enrollment in the course and to take the examination is conditioned upon a record of attendance satisfactory to the professor. A student who exceeds 5 absences may be compelled to withdraw from the course, or may be barred from sitting for the final exam. Students who are forced to withdraw for exceeding the allowed absences may receive a grade of FA (failure due to excessive absence). This policy is consistent with American Bar Association Standards for Law Schools.

Course Web Site:
A TWEN home page is being used for this course. Each student must register for TWEN and provide an email address that will be checked on a regular basis.

Computers:
Students may use laptop computers for class related purposes.
Class Cancellation:
If the instructor must cancel a class, notices will be sent to students via TWEN and posted on the classroom door. If there is inclement weather, students should visit the University of Baltimore web site or call the University's Snow Closing Line at (410) 837-4201. If the University is open, students should presume that classes are running on the normal schedule.

Academic Integrity:
Students are obligated to refrain from acts that they know or, under the circumstances, have reason to know will impair the academic integrity of the University and/or the School of Law. Violations of academic integrity include, but are not limited to: cheating; plagiarism; misuse of library materials; use of another’s book or study materials without consent; unapproved multiple submissions; material misrepresentation of one’s academic history or standing; misrepresentation of any academic matter; intentionally giving another student false or inaccurate information about class requirements; inappropriate discussion of exams; and misrepresenting or falsifying class attendance reports. [Reference to School of Law Honor Code, https://law.ubalt.edu/academics/policiesandprocedures/honor_code/index.cfm]

Title IX Sexual Harassment and Sexual Misconduct Policy:
The University of Baltimore’s Sexual Harassment and Sexual Misconduct policies are compliant with Federal laws prohibiting discrimination. Title IX requires that faculty, student employees and staff members report to the University any known, learned or rumored incidents of sex discrimination, including sexual harassment, sexual misconduct, stalking on the basis of sex, dating/intimate partner violence or sexual exploitation and/or related experiences or incidents. Policies and procedures related to Title IX and UB’s nondiscrimination policies can be found at: http://www.ubalt.edu/titleix.

Disability Policy:
If you are a student with a documented disability who requires an academic accommodation, please contact Karyn Schulz, Director, Center of Educational Access, Office of Disability and Access Services, at 410-837-4141 or kschulz@ubalt.edu.

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