

WESTERN STATE COLLEGE OF LAW  
AT WESTCLIFF UNIVERSITY

SYLLABUS, POLICIES, AND ASSIGNMENTS  
2023 FALL SEMESTER  
ESTATES, SECTION 497A

PROFESSOR C. SHEPPARD

**CLASS MATERIALS:**

REQUIRED TEXT: Peter T. Wendel and Robert G. Popovich, **CALIFORNIA WILLS AND TRUSTS, Cases, Statutes, Problems, and Materials (2017, Carolina Academic Press)**  
ISBN 978-1-61163-674-1  
eISBN 978-1-5310-0840-6

RECOMMENDED TEXT: Roger W. Andersen, *Understanding Trusts and Estates, Third Edition* (2003, LexisNexis)  
ISBN 0820557269

**THE COURSE TEXT**

I have selected a text that focuses on the law of California regarding intestate succession, wills, and trusts because almost all graduates of the College of Law sit for the California Bar Exam. The following information is posted to The State Bar of California website:

“Applicants taking the California Bar Exam may be required to answer questions involving issues from all of the subjects listed below:

...

- Trusts
- Wills and Succession

...

**Wills and Succession**

Applicants should be familiar with the following provisions of the California Probate Code and understand California law in the specific areas noted:

Division 2. General Provisions

Part 1. Effect of Death of a Married Person on Community and Quasi-Community Property Sections 100 – 103

Part 3. Contractual Arrangements Relating to Rights at Death, Sections 140-147

Part 5; Simultaneous Death, Sections 220, 222-224

Part 6: Distribution Among Heirs or Beneficiaries, Section 240

### **Division 6 Wills and Intestate Succession**

Part 1. Wills

Chapter 1. General Provisions, Sections 6100, 6101, 6104, 6105

Chapter 2. Execution of Wills, Sections 6110-6113

Chapter 3. Revocation and Revival, Sections 6120, 6121, 6123

Part 2. Intestate Succession, Sections 6400-6402

### **Division 11. Construction of Wills, Trusts, and Other Instruments**

Part 1. Rules of Interpretation of Instruments, Sections 21105, 21109, 21110

Part 6. Family Protection: Omitted Spouses and Children [for decedents dying on or after January 1, 1998]

Chapter 2. Omitted Spouses, Sections 21610-21612

Chapter 3. Omitted Children, Sections 21620-21623”<sup>1</sup>

### **NOTICE TO 2024 CALIFORNIA BAR EXAM TAKERS**

The following notice is posted to the State Bar of California website:

**“Please note that the State Bar is planning to increase Admissions-related fees for 2024, including for the bar exam, beginning with the February 2024 bar exam.**

The precise amount of the fee increase will be adopted by the State Bar Board of Trustees during its September 21-22 meeting. The proposal out for public comment until July 31, 2023, increases the exam fee for nonattorneys (sic) from \$677 to \$850.

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<sup>1</sup> <https://www.calbar.ca.gov/Admissions/Examinations/California-Bar-Examination/California-Bar-Examination-Scope>

For attorneys, the proposal is to increase the exam fee from \$983 to \$1,500. Based on the Board’s discussion of these increases at its May 2023 meeting, the Board is likely to approve fees in this range. The application for the February 2024 bar exam is expected to open October 1. The fee adopted by the Board will be assessed as of that date.

Also out for public comment is a proposal to reduce the number of testing locations for the February 2024 bar exam. That comment period also closes on July 31, 2023, and the final decision for the administration of the February bar exam will be made in August.”<sup>2</sup>

### **COURSE COVERAGE AND OPPORTUNITIES:**

The course of Estates is a study of principles of law regarding intestate succession, wills, and trusts. The course material will not be limited to the provisions of the California Probate Code with which a person who sits for the California Bar Exam is expected to be familiar. Furthermore, portions of course material include comparisons between various sections of the California Probate Code with various sections of the Uniform Probate Code.

In the basic Property course, you learned that titles to and interests in property may be transferred either during a transferor’s lifetime an (*inter vivos* transfer), or as of the time of the death of the transferor (a testamentary transfer). You will encounter circumstances in this course that involve both *inter vivos* and testamentary transfers of titles to or other interests in property. An *inter vivos* transfer might result in the transferred property right not constituting a part of a decedent’s testamentary estate. A testamentary transfer may be in the form of a devise or legacy under a will, or by operation of law under the law of intestate succession.

The topics upon which we will focus most of our attention during this course are:

1. Introduction to “the Wills and Trust Landscape”
  - a. Probate vs Nonprobate Property
  - b. An overview of estate planning
  - c. Professional Responsibility—Ethical Issues
2. Intestate Succession
  - a. An Estate Plan by Default
  - b. The Structure of Intestate Succession
    - (1) Surviving Spouse
    - (2) Descendants
      - (a) Issue

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<sup>2</sup> <https://www.calbar.ca.gov/Admissions/Examinations/California-Bar-Examination/Notice-to-2024-Bar-Exam-Takers>

- (b) Natural and Adopted Children
    - (c) Posthumously Born or Posthumously Conceived Children
  - (3) Ancestors, Collaterals, Others
- c. Doctrines that may affect an heir's share
  - (1) The Advancement Doctrine
  - (2) The Slayer Doctrine
  - (3) The Disclaimer Doctrine
- 3. Wills: Capacity and Contests
  - a. Capacity to Make a Will
  - b. Undue Influence
  - c. Duress
  - d. Fraud
  - e. Tortious Intentional Interference with an Expectancy
- 4. Wills Act Formalities
  - a. Attested (Witnessed) Wills
  - b. Holographic Wills
- 5. Will Revocation
  - a. Express Revocation
  - b. Implied Revocation
  - c. Revival of a previously revoked will
  - d. Dependent Relative Revocation (DRR)
- 6. Components of a Will
  - a. The Integration Doctrine
  - b. Republication of a Will by Codicil
  - c. The Doctrine of Incorporation by Reference
  - d. Acts of Independent Significance
  - e. Contracts Concerning Wills
- 7. Construing Time of Death Gifts
  - a. Mistaken or Ambiguous Language in Wills: Admissibility of Extrinsic Evidence
  - b. Death of Beneficiary before Death of Testator: Lapse/Anti-Lapse
  - c. Changes in Property after Execution of Will
    - (1) Ademption
    - (2) Exoneration
    - (3) Abatement
- 8. Family Protection
  - a. Migrating Couples
  - b. Quasi-Community Property
  - c. Pretermitted Spouses and Pretermitted Children
- 9. NonProbate Transfers
  - a. Life Insurance
  - b. Joint Tenancy
  - c. Legal Life Estate and Remainders

- d. *Inter Vivos* Trusts
- 10. Creation of Express Trusts
  - a. Private Trusts Compared With Charitable Trusts
  - b. Requirements for Creation of an Express Trust:
    - (1) Intent
    - (2) Trust Property
    - (3) Formalities
      - (a) Delivery
      - (b) Statute of Frauds
      - (c) Statute of Wills
    - (4) Beneficiary/Beneficiaries
    - (5) Lawful Purpose
- 11. Testamentary Additions to Inter-Vivos Trusts
  - a. Incorporation by Reference Doctrine
  - b. Acts of Independent Significance
  - c. Uniform Testamentary Additions to Trusts Act
- 12. Revocation of Express Trusts
  - a. Default Rules to Determine Whether the Trust is or is not Revocable
  - b. Mechanics of Revocation
- 13. Nature of a Trust Beneficiary's Interest
  - a. Equitable Interest
  - b. Distribution to Beneficiary: Mandatory or Discretionary
  - c. Spendthrift Trusts and Trusts with Spendthrift Characteristics
- 14. Modification of an Express Trust
  - a. By the Settlor
  - b. The Deviation Doctrine
  - c. The *Cy Pres* Doctrine
- 15. Termination of an Express Trust
  - a. By all parties to the trust
  - b. By all beneficiaries of the trust
- 16. Trustee's Powers and Trustee's Duties
  - a. From Limited Powers to Fiduciary Administration
  - b. The Duty of Loyalty
  - c. The Duty of Prudence
  - d. The Duty of Impartiality
  - e. The Duty to Inform and Account
- 17. Alienation of the Beneficial Interest
- 18. Removal of a Trustee of an Express Trust
- 19. Charitable Trusts: Charitable Purposes, *Cy Pres*, and Supervision
  - a. Charitable Purposes
  - b. *Cy Pres* and Deviation
  - c. Enforcement of Charitable Trusts

20. Trusts: Powers of Appointment
  - a. Purposes, Terminology, and Types of Powers
  - b. Exercise of a Power of Appointment
  - c. Failure to Exercise a Power of Appointment
21. Trusts: Construction and Future Interests
  - a. Future Interests
  - b. Construction of Trust Instruments
22. The Rule Against Perpetuities and Trust Duration
  - a. The Common Law Rule
  - b. Perpetuities Reform
  - c. Application of the Rule to Class Gifts and Powers of Appointment
  - d. Other Durational Limits
23. Summary of Trusts Created by Operation of Law
  - a. Constructive Trusts (an equitable remedy)
  - b. Resulting Trusts (based on implied intent)

### **SKILLS AND VALUES**

A task force report exists that is commonly referred to as “The MacCrate Report.” The authors of that report examined the legal skills and values listed above as well as other skills and values. [Section on Legal Education & Admissions to the Bar, American Bar Association Legal Education and Professional Development —An Educational Continuum (Report of the Task Force on Law Schools and the Profession: Narrowing the Gap, 1992). A collection of law review articles that represent supporting and critical views of “The MacCrate Report” appear in Volume 69 of the *Washington Law Review* published in July of 1994.]

On page 1 of his “Property Law Simulations” text, Professor Sprankling notes: “The MacCrate Report had little impact on legal education. But the Carnegie report has been more successful, prompting many law schools to make curricular changes that expand opportunities for experiential learning.” Actually, Western State was one of the few law schools that took special note of The MacCrate Report prior to the publication of the Carnegie Report as is evidenced by Western State’s “Mission Statement” and various aspects of the law school’s course offerings both in terms of courses offered and the manner in which the courses are taught.

In this course, you will be provided with opportunities to:

- Enhance your analytical, problem solving, statutory deconstruction, and related skills that you will use as an attorney either in non-dispute resolution settings, or in dispute resolution settings, or both.

- Develop a working knowledge of various principles of law regarding intestate succession, wills, and trusts; and enhance your understanding of various principles of law regarding property, contracts, torts, civil procedure, and other.
- Enhance your oral communication skills and legal research and writing skills.
- Develop and enhance client counseling skills.

### **WESTERN STATE COLLEGE OF LAW – PROGRAMMATIC LEARNING OUTCOMES**

**Western State College of Law’s curriculum is designed so that every student achieves a level of competency prior to graduation in each of the eight Programmatic Learning Outcomes listed below:**

**(1) Doctrinal Knowledge**

Students will demonstrate knowledge of substantive and procedural law in the core curriculum subjects, including Contracts, Criminal Law, Criminal Procedure, Torts, Real Property, Business Associations, Evidence, Civil Procedure, Constitutional Law, Estates, Community Property, Remedies, and Professional Responsibility.

**(2) Practice Skills**

Students will demonstrate the development of other law practice skills. Each student’s chosen outcomes within this category will be varied based on the student’s particular interests, coursework, and work experiences. They may include, but are not limited to, the following topics: oral presentation and advocacy; interviewing; counseling; client service and business development; negotiations, mediation, arbitration, or other alternative dispute resolution methods; advanced legal research and writing (excluding purely academic papers and the first four units earned in introductory first-year legal research and writing class); applied legal writing such as drafting contracts, pleadings, other legal instruments; law practice management or the use of technology in law practice; cultural competency; collaboration or project management; financial analysis, such as accounting, budgeting project management, and valuation; cost benefit analysis in administrative agencies; use of technology, data analyses, or predictive coding; business strategy and behavior; pre-trial preparation, fact investigation, such as discovery, e-discovery, motion practice, assessing evidence, or utilizing experts; trial practice; professional civility and applied ethics; a law clinic that includes a classroom component; or a legal externship that includes a classroom component.

**(3) Legal Analysis**

Students will demonstrate the ability to identify the factual and legal issues implicated by a fact pattern and to appropriately use cases (including identifying

- the salient features of an appropriate precedent case, identifying legally significant similarities and differences between the precedent case and a fact pattern and explaining why those are legally significant) and rules (including the ability to connect legally significant facts in a fact pattern to the rule) to predict how a court would decide the issue. Students will also demonstrate the ability to identify and evaluate the public policies of a precedent case or rule, and to evaluate how public policy can impact the application of a rule to the legal issue.
- (4) **Legal Research**  
Students will demonstrate the ability to locate relevant legal authority using a variety of book and electronic resources, and to properly cite such legal authority.
- (5) **Communication**  
Students will demonstrate the ability to communicate both orally and in writing in a manner appropriate to a particular task to effectively convey the author's or speaker's ideas. This includes audience sensitivity in written and oral communication (the ability to adopt a tone, style, and level of detail appropriate to the needs, knowledge and expertise of the audience); and written communication basic proficiency (the ability to use the conventions of grammar, spelling, punctuation, diction and usage appropriate to the task and sufficient to effectively convey the author's ideas).
- (6) **Advocacy of Legal Argument**  
Students will demonstrate the ability, in both oral and written formats, to evaluate the legal, economic and social strengths and weaknesses of a case and use case and statutory authority as well as public policy to persuade others. Making policy-based arguments includes the ability to identify and evaluate the public policies of a precedent case or rule and their implications, and be able to assert such appropriate arguments to resolution of the application of a rule to the legal controversy.
- (7) **Client Sensitivity and Cultural Competency**  
Students will demonstrate an awareness of clients' needs and goals, including a sensitivity to clients' backgrounds and circumstances (including, but not limited to, socio-economic, gender, race, ethnicity, educational, disability and/or religious background(s)), the ability to make decisions that reflect an appropriate focus on those needs and goals, and awareness that cultural issues may affect the relevance of facts and application of the law.
- (8) **Legal Ethics**  
Students will demonstrate the ability to identify ethical issues in law practice contexts and make appropriate decisions to resolve such issues.



## **COURSE METHODOLOGY**

I utilize a combination of classroom methods to assist you in your effort to achieve the objectives of this course, including use of the Socratic method of interaction to enable you to properly gauge the current level of your working knowledge of course subject matter, use of the case method of exploring and examining legal principles and methods of application of those principles (including, but not limited to, how to deconstruct case law, statutory law, and other sources of law).

*It will be incumbent upon you to engage in an appropriate study and review of each course assignment before we engage in classroom discussions about the course material that is part of that assignment. The primary focus of our classroom discussions will be the manner in which you should use the course material to raise and resolve issues that can arise in either a dispute resolution setting or a transactional or other non-dispute resolution setting. To engage in an appropriate study of course material, at a minimum, you must complete a critical reading of that material; and you must brief each principal case included in the course text, each case cited in a text note, and any case which I might assign as additional reading. You should also read additional reference material (e.g., relevant portions of a hornbook or treatise). Your study habits must also include you engaging in activities that will hone your skills of legal analysis and exam taking and writing. I will also expect you to have prepared appropriate work product regarding text problems that are part of the assigned reading. Adhere to the IRAC method of legal analysis to the extent necessary during classroom discussions, when engaged in problem solving exercises, and during the course final exam.*

## **EXPECTATION OF YOUR AMOUNT OF OUTSIDE PREPARATION TIME**

I expect you to devote a **MINIMUM** of four and one-half hours a week to prepare for each one and one-half hour class session (i.e., a **minimum** of nine hours a week).

## **LEXIS CLASSROOM**

**You are required to enroll in the course LexisNexis Classroom platform** so that you will be able to access information that I have posted to that platform for your benefit; and so that you will be able to receive emails that I will send to members of the class using the email function of the LexisNexis Classroom platform. I encourage you to be an active LexisNexis Classroom Discussion Board participant.

You will be able to enroll in the course LexisNexis Classroom platform on and after 9:00 a.m., Monday, July 31, 2023. The last day that you will be able to access the web course material is 11:59 p.m., Sunday, December 31, 2023. To enroll in Lexis Classroom:

1. Log into LexisNexis for Law School at <https://www.lexisnexis.com/lawschool/>.
2. In the **Student** view, click the **Add A Course** link found on the right-hand side of the page.
3. Locate my name (Sheppard); then click my name.
4. Locate **Select Course to Enroll**; locate Trusts\_And\_Estates\_112176 and click.
5. Follow the instructions to enroll in the Trusts and Estates Lexis Classroom
6. If you are directed to enter a password, enter: 9KLRGM

If you encounter a problem while attempting to enroll in the web course, please contact a LexisNexis representative, or Academic Support person Helen Terzis (714-459-1163), or Library Director John O'Donnell (714-459-1110).

### **EXAMINATION AND GRADING**

**There will not be a midterm exam in this course.** Each class session will provide to you ample opportunity for you to engage in self-assessment of your level of understanding of course material which will enable you to plan each of your weekly study regiments accordingly; and to formulate questions that you will need to present to me either during a class session, or during an office consultation, or by email, or a combination thereof.

There will be one graded exam; to wit: the course final exam.

### **FINAL EXAM**

A three-hour, open book, and open notes final exam will be administered as part of this course. The final exam will consist of two ninety-minute essay problems.

The maximum number of points that you will be able to earn on the final exam will be 100 points. I will use the score that you earn on the final exam to determine your numeric course grade.

### **GRADING**

Your academic performance in this course will be measured and recorded using a numeric grade system on a scale of 0.0 to 4.0. Please also read that portion of the current edition of the Student Handbook regarding the "Grading System and Student Honors."

To earn a numeric grade of 4.0, your course grade points must equal 90 course points or better. The total of 89 course grade points results in a 3.9 course grade; 88 course grade points results in a 3.8 course grade and so forth. You must amass at least 75 course grade points to earn a Foundation Law Point.

The foregoing illustrates that the highest accumulation of raw points earned by a student enrolled in this course is **not** automatically regarded as an “A.” For example, if the best aggregate, graded student work product in this class results in a total of 85 course grade points, the highest grade in the class will be 3.5. On the other hand, if the exam work product of **every** student in the class results in total course grade points for each student that is 90 or better, then the course grade earned by every member of the class will be 4.0.

### **PRACTICE EXERCISES**

I encourage you to include exam preparation or writing *exercises* as part of your daily study habits beginning in the second week of the semester and continuing throughout the semester including the interim between the last day of class and the administration of the final exam. Examples of such exercises include drafting an interrogatory that is the product of issue spotting, drafting a rule statement, or drafting an analysis using the IRAC approach to legal analysis. You may submit your exercises to me for me to review and provide comments to you. Please note that if you wait until close to the end of the semester to submit any such work product to me for review and comment, you will run the risk that I will not have sufficient time to provide feedback to you before the final exam is administered to the class; or that you will not have sufficient time to take advantage of feedback that I provide to you. I do **not** critique student course outlines.

### **OFFICE HOURS, ZOOM CONFERENCES, OFFICE TELEPHONE, E-MAIL, FAX**

I encourage you to communicate with me on a regular basis. I plan to hold office hours as follows:

Mondays: 10:00 A.M. to NOON; 3:15 P.M. to 4:30 P.M. (Except Labor Day)  
Tuesdays: 10:00 A.M. to 11:30 P.M.  
Thursdays: 10:00 A.M. to NOON

If you are not able to meet with me in person, please let me know so that we may schedule a Zoom conference.

Conferences with me by two or more students at a time are encouraged.

My WSCL email address is [csheppard@wsulaw.edu](mailto:csheppard@wsulaw.edu).

My WSCL office telephone number is (714) 459-1152. The faculty fax number is (714) 525-2786.

## ATTENDANCE

**Attendance in class is mandatory.** If you miss more than six hours of class sessions, or other class activities where attendance is mandatory, you will be subject to being administratively withdrawn from the course. If you have not already done so, you should review the appropriate portions of the current edition of the “Student Handbook” regarding attendance requirements, and the grade assigned to a student who is administratively withdrawn from a course due to excessive absences.

Due to possible differences in the manner in which course materials are covered in class, you are **not** permitted to “make-up” a missed class by attending another section of this course regardless of whether the other section is taught by me or by another Professor.

## PARTICIPATION IN CLASS AS AN ACTIVE LEARNER

**To be successful in law school, you must be an active learner. You will gain maximum benefit from class attendance only if you have engaged in a proper preparation for class. Proper preparation for class by you will include, but not be limited to: proper time management; engaging in a critical reading and re-reading of reading assignments; briefing case opinions included in the assigned reading; critically reading and re-reading text notes and footnotes; analyzing problems included in the assigned reading; critically reading court opinions of the cases cited in the text notes or text problems; critically reading and deconstructing pertinent statutory law; reviewing and editing your class notes from prior class sessions; personally preparing and reviewing study aids (e.g., sections of your personally prepared course outline, flash cards, flow charts, etc.); reading and re-reading appropriate segments of hornbooks, treatises, or commercial study aids; and including some form of exam taking exercise as part of your daily study habits.**

I call your attention to the following law review article: Laurel Currie Oates, *Beating The Odds: Reading Strategies of Law Students Admitted Through Alternative Admissions Program*, 83 IOWA L. REV. 139 (1997). Portions of that law review article illustrate how a student might “outperform” his or her “law school predictors” by being an active learner and not a passive learner. That is an important message regardless of whether a person has been admitted to law school through a regular admissions program, as you were, or an alternative admissions program (e.g., an admissions by performance program).

Regardless of whether a class session is conducted in person or via Zoom or some other distant learning platform, you should be prepared to participate in class on a regular basis. You should be an active listener in class at all times when you are not speaking in class. Being an active listener includes assessing whether you understand, or you do not understand, comments being made by me, or by one of your classmates. If you conclude

that you do not understand the comments of others, you should raise your hand to be recognized, and when recognized by me, you should voice your question. If you understand the comments, you should then assess whether you agree or disagree with those comments. More importantly, you should assess the reason or reasons for your agreement or disagreement. Please do not hesitate to seek recognition to voice your questions or comments along those lines as well.

If you are not prepared for a particular class session, please notify me prior to the start of that class session. You will not be penalized for being unprepared for a class session **provided** you have not been unprepared for two prior class sessions. If you have not been prepared for two prior class sessions, I may regard you as being absent from the third-class session for which you are unprepared. Furthermore, I may regard you as being absent from any subsequent class session for which you are not prepared. Of course, you will not be regarded as being unprepared for class if you make a good faith, although erroneous, attempt at analyzing a particular question or point that is a subject matter of discussion during a class session.

### **DECORUM**

Regardless of whether a class session is conducted in person or via Zoom or some other distant learning platform, you are expected to maintain proper decorum when entering the classroom or a zoom session, while attending and participating in each class session, and when departing the classroom or zoom session. You are also required to adhere to the College of Law's "Principles of Community" and the College of Law's "Honor Code."

### **SEATING CHART**

I plan to circulate a seating chart during the initial on campus class session.

### **DISABILITY SERVICES STATEMENT**

Western State College of Law provides accommodations to qualified students with disabilities. The Disability Services office assists qualified students with disabilities in acquiring reasonable and appropriate accommodations and in supporting equal access to services, programs, and activities at Western State College of Law.

To seek reasonable accommodations, a student must contact Senior Assistant Dean Donna Espinoza, Student Services Director and Disabilities Services Coordinator, whose office is in the Students Services Suite. Dean Espinoza's phone number and email address are: (714) 459-1117; [despinoza@wsulaw.edu](mailto:despinoza@wsulaw.edu). When seeking accommodations, a student should notify Dean Espinoza of her or his specific limitations and, if known, her or his specific requested accommodations. Students who seek accommodations will be asked to supply medical documentation of the need for accommodation. Classroom accommodations are not retroactive, but are effective only upon the student sharing

approved accommodations with the instructor or professor. Therefore, students are encouraged to request accommodations as early as feasible with Dean Espinoza to allow for time to gather necessary documentation. If you have a concern or complaint in this regard, please notify Dean Marisa Cianciarulo at [mcianciarulo@wsulaw.edu](mailto:mcianciarulo@wsulaw.edu) or (714) 459-1168. Complaints will be handled in accordance with the College of Law’s “Policy against Discrimination and Harassment.”

**TABLE OF TEXT READING ASSIGNMENTS**

<b>Wk.</b>	<b>Thur. Mon.</b>	<b>Text Pages</b>	<b>Topics</b>
01	08/24  08/28	xxxiii-xxxiv 03 – 10; 15 - 23  25 - 49	Preface Ch. 1: Introduction and the Wills & Trusts Landscape – Issue Spotting Exercises re Problems on pp. 9 – 10; Skip <i>In re Succession of Plummer</i> , pp. 10 - 14 Ch. 2: The California Intestate Scheme including the problems on pp. 33-34; 36-37; and 42
02	08/31  09/04	49 – 70  ---- -- ----	Ch. 3: Who Qualifies as an Heir under the California Intestate Scheme? Labor Day: No Class Session
03	09/07 09/11	70 – 96 96 – 117	Ch. 4: Miscellaneous Doctrines That May Affect an Heir’s Share; Ch. 5: Testamentary Capacity
04	09/14 09/18	118 – 145 145 – 166	Ch. 5: Testamentary Capacity; Ch. 6: Wills Act Formalities
05	09/21 09/25	166 – 186 186 – 213 10 – 14	Ch. 6: Wills Act Formalities  <i>In re Succession of Plummer</i>
06	09/28 10/02	215 – 238 238 – 257	Ch. 7: Will Revocation; Ch. 8: Components of a Will
07	10/05 10/09	257 – 280 280 – 301	Ch. 8: Components of a Will; Ch. 9: Will Construction
08	10/12 10/16	301 – 331 331 – 354	Ch. 9: Will Construction; Ch. 10: Family Protection; Ch. 11: Nonprobate Transfers
09	10/19 10/23	355 – 385 385 – 419	Ch. 11: Nonprobate Transfers; Ch. 12: Trusts—Creation and Revocability
10	10/26 10/30	419 – 453 453 – 476	Ch. 12: Trusts – Creation and Revocability
11	11/02 11/06	476 – 498 498 – 525	Ch. 13: Trust Life—Beneficiary’s Perspective
12	11/09 11/13	527 – 549 549 – 576	Ch. 13: Trust Life—Beneficiary’s Perspective; Ch. 14: Trust Life –Trustee’s Perspective
13	11/16 11/20	576 – 594 595 – 625	Ch. 14: Trust Life –Trustee’s Perspective; Ch. 15: Charitable Trusts

<b>Wk.</b>	<b>Thur. Mon.</b>	<b>Text Pages</b>	<b>Topics</b>
14	11/23 11/27	---- -- ----- 625 – 647	No Class Session – Thanksgiving Day Ch. 15: Charitable Trusts
15	11/30 12/04	649 – 667 667 – 692	Ch. 16: Powers of Appointment; Summary of Trusts Created by Operation of Law