

5339 Trusts & Wills
Section 25207
Fall 2014
Class Assignments and Policies

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 Phone: (713) 659-7777
 Class Time: 7:30-8:50 p.m. Mon. & Wed.
 Dates: August 25, 2014 - December 1, 2014
 (references to Code Sections are to the Texas Estates Code unless otherwise specified)

UNIT 1 - FREEDOM OF DISPOSITION & MECHANICS OF SUCCESSION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
1	8/25	1-41(top) (read for "overview")	22.001	256.001
			22.008	257.001
		41(bottom)-51	22.009	301.151
		[Subject matter will spill	22.018	304.001
		over to Class 2]	22.031	304.002
			22.034	304.003
			55.001	307.002
			101.001	401.001-401.003
			101.103	402.002
			101.051	403.051
			205.001-205.007	403.059
			251.002	

UNIT 2 - INTESTACY

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
2	8/27	63-147	202.002	Fam.162.507
3	9/3		202.009	22.004
4	9/8		202.201	22.026
			202.202	201.054
			202.205	201.056
			Tex. Const. Art I, Sec. 32	201.062
			Fam. 6.204	201.051
			201.001	201.052
			201.002	201.151
			201.102	201.152
			201.103	122.002
			201.057	122.003
			201.058	122.051
			201.060	122.055
			201.061	122.056
			201.101	122.101
			Prop.71.001	122.102
			Prop.71.003	122.104
			Fam. 161.206	122.107

UNIT 3 - WILLS: FORMALITIES

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
5	9/10	147-265	251.001	256.153
6	9/15		251.051	251.052
7	9/17		251.101	251.107
			251.102	256.154
			251.103	253.002
			251.104	256.156
			251.1045	123.001
			251.105	123.002
			251.106	123.052
			254.002	Fam. 9.301-9.302

UNIT 4 - WILL CONTESTS

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
8	9/22	265-327	55.002
9	9/24		256.151
			256.152
			254.003
			254.005
			256.204

UNIT 5 - WILL CONSTRUCTION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
10	9/29	327-385	255.001-255.004	121.052
11	10/1		255.151-255.154	121.053
			255.101	121.101
			255.102	121.102
			255.251-251.253	121.151
			255.301	121.152
			255.302	121.153

UNIT 6 - TRUSTS: CHARACTERIZATION AND CREATION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
12	10/6	385-435	Prop. 111.001
			Prop. 112.001-112.009
			Prop. 112.031
			Prop. 112.032
			Prop. 112.005
			Prop. 112.037
			Prop. 112.004

UNIT 7 - NON-PROBATE TRANSFERS

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
13	10/8	435-511	111.051	112.051
14	10/13		111.052	112.052
			Prop. 112.008	112.054
			Prop. 112.033	112.152
			Prop. 112.034	254.001
			113.151	101.002
			113.152	111.001

UNIT 8 - LIMITS ON FREEDOM OF DISPOSITION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>	
15	10/15	511-579	Prop 42.001-42.002	Tex. Const. Art.
16	10/20		102.002-102.006	XVI Sec. 15
			353.051-353.053	Tex. Const. Art.
			353.152	XVI Sec. 52
			353.153	Fam 3.001-3003
			353.101	Fam. 4.102
			353.102	Fam. 4.202
			353.105	Fam. 4.203
			255.051-255.056	201.003
			403.001	

UNIT 9 - TRUST ADMINISTRATION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
17	10/22	579-687	Prop. 114.081-114.086
18	10/27		Prop. 113.001-113.025
19	10/29		Prop. 113.051-113.055
20	11/3		Prop. 113.029
			Prop. 114.007
			Prop. 113.151
			Prop. 113.152

UNIT 10 - TRUSTS: ALIENATION AND MODIFICATION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
21	11/5	687-743	Prop. 112.035
			Fam. 154.005
			Prop. 112.051
			Prop. 112.052
			Prop. 112.054
			Prop. 112.057
			Prop. 112.059
			Prop. 113.081-113.083

UNIT 11 - CHARITABLE TRUSTS

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
22	11/10	743-795	Prop. 113.026 Prop. 123.001-123.006

UNIT 12 - POWERS OF APPOINTMENT

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
23	11/12	795-833	Prop. 181.001-181.004 Prop. 181.051-181.058 Prop. 181.081-181.083 255.351

UNIT 13 - PERPETUITIES

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
24	11/17	877-919	Tex. Const. Art I, Sec. 26 Prop. 112.036 Prop. 5.043

UNIT 14 - WEALTH TRANSFER TAXATION

<u>Cl#</u>	<u>Date</u>	<u>Pages of Text</u>	<u>Code Sections</u>
25	11/19	919-981	
26	11/24		

UNIT 15- REVIEW/WRAP-UP

<u>Cl#</u>	<u>Date</u>
27	12/1

FINAL EXAM (December 13, 2014, 9:00 am-noon)

Final Exam will be a closed-book exam. The format will be multiple choice questions, short answer, and essay.

ATTENDANCE POLICY:

We will follow the school's 80% attendance requirement. If a student does not attend 80% of the classes, that student will be dropped from the class.

CLASS PARTICIPATION:

Everyone should read all material and be prepared to discuss issues raised by the readings. Your grade may be affected by class participation and attendance. I reserve the right to raise or lower your grade based upon class participation and/or absences.

CONTACT:

I am not setting any particular office hours at this time. However, you are welcome to contact me by email or at my business phone number.