

SYLLABUS

Trusts and Estates

Law 330 (001) – 20535 (3 cr.)

Spring 2024

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Office Hours: Wednesdays, 12 – 1:30 pm (please schedule at

<https://calendly.com/aggarwal/te-office-hrs>).

MATERIALS

Sitkoff & Dukeminier, *Wills, Trusts & Estates* (11th ed. 2021)

Various statutory provisions (links below)

LEARNING OBJECTIVES

Through this course, we anticipate you will learn the following:

- To spot and analyze major issues in U.S. wills, trusts, and estates for the bar exam and all the friends and family who will ask;
- What fiduciaries and fiduciary duties are; and
- To identify the layers and sources of law relevant to estate planning and administration, and to navigate some of them.

EXPECTATIONS

Attendance will be taken during each class, and the reading assignments are required preparation for each class.

We will designate students to be “on call” to discuss the reading during class. If you won't be in class or are not prepared when you're on call, please trade days with someone or let us know before class. There will be short pop quizzes for everyone during some classes. Your contributions to the class discussion and quiz scores can affect your final grade as a participation adjustment.

A closed-book final exam will determine the rest of your grade. It will have both multiple choice and short answer questions.

READING ASSIGNMENTS

Please read the listed chapters/sections from Sitkoff & Dukeminier's *Wills, Trusts and Estates*. Skip anything that is crossed out. (We're skipping some cases and excerpts to make the reading assignments more manageable.) Please also review any assigned code sections.

Please note that the schedule of assignments and topics below is tentative. We may make changes as we progress through the semester to take into account the interests of the class and reality. We will announce any changes during class.

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| | Daniel B. Kelly, <i>Restricting Testamentary Freedom: Ex Ante Versus Ex Post Justifications</i> | 18 |
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| | Edward N. Wolff, <i>A Century of Wealth in America</i> | 22 |
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[§ 64.2-200](#) Course of descents generally; right of Commonwealth if no other heir

[§ 64.2-201](#) Distribution of personal estate; right of Commonwealth...

[§ 64.2-202](#) When persons take per capita and when per stirpes; collaterals...

[§ 64.2-203](#) Inheritance rights of certain individuals

[§ 64.2-204](#) Afterborn heirs

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[§ 64.2-416](#) Devises, bequests, and distributions that fail; how to pass

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FEBRUARY 29 – CASE STUDY

We'll provide you with a couple of case studies electronically by Feb. 27. Review and analyze them using what we've covered in class so far. We'll discuss them during class.

MARCH 5 & 7 - SPRING BREAK

No reading! 🤔

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