

Professor Hymel – Spring 2012
Estates and Trusts - Assignments

Course Description: Estates and Trusts ("E&T") is the basic, introductory course on decedents' estates and trusts. E&T focuses primarily on the law of wills, will substitutes and the uses of trusts. During the semester, we will think critically about problems in family wealth transmission and compare alternatives. We will emphasize the basic theoretical structure and the general philosophy and purposes that unify the field of donative transfers. It is not necessary to have taken any course as a prerequisite to E&T, and our discussions in class will be oriented to people who are completely new to the subject matter.

The Instructor: My office is located in room 311, and my office phone number is 348-9831. My email address is mhymel@law.ua.edu. Generally, I will be available in my office for questions or comments after class, or we can schedule a meeting by appointment. Scheduled office hours will be on Tuesday from 3:30-4:00 p.m. and on Friday from 1:00 p.m. to 2:00 p.m.

Casebook and Materials: (1) Dukeminier, Sitkoff, and Lindgren, Wills, Trusts, and Estates (8th edition); (2) Uniform Probate Law and Rules 2010 Edition.

Class: I strongly recommend that you prepare for and attend our classes. During class, I will indicate the relative importance of the various areas covered in the reading, and I may mention concepts and issues that are not covered in the casebook. Generally, I will ask

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you to be responsible for the level of detail that is discussed in class; if I expect you to have more detailed knowledge about a particular area than contained in our class discussion, I will let you know that in class. I think you will find time spent in class to be well-spent as far as learning the subject matter of the course and doing well on the exam.

Grade in Course: Your grade in the course is based on your exam score, which (of course) is graded "blind".

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Note: We will spend only one class session on some assignments, while other assignments will take slightly longer to cover.

Introduction

1. Pp. 1-26 (all page references are to D,S&L).
2. Pp. 27-49; UPC §§ 3801, 3802, 3803, 6102, 3203.
3. Pp. 469-475; UPC §§ 2401 through 2405.
4. Pp. 476-483, 487-508; UPC §§ 2202 to 2218, 3902.

Intestacy

5. Pp. 71-86; ARS §§ 14-1201(5),(11),(21),(23),(27),(59); 14-2101 through 14-2105; 14-2701, 14-2702.

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6. Pp. 87-97; ARS §§ 14-2106, 14-2107, 14-2709.

7. Pp. 97-108, 115-130, 133-140; ARS §§ 14-2108, 14-2113, 14-2114, 14-2705, 14-2109 through 14-2111.

8. Pp. 145-157; ARS §§ 14-2801, 14-2802, 14-2803, 14-2804, 46-456