

Module Title Private Client	Reference BSM559 SCQF SCQF Level 11 SCQF Points 20 ECTS Points 10 Created March 2004
Keywords private client, wills, trusts, executries	Approved March 2013 Amended March 2013 Version No. 2

This Version is No Longer Current

The latest version of this module is available [here](#)

Prerequisites for Module

None.

Indicative Student Workload

	Full Time	Part Time
<i>Contact Hours</i>		
Assessment	12	12
Seminars/tutorials	80	80

Corequisite Modules

None.

<i>Directed Study</i>		
Directed Study	60	60

Precluded Modules

None.

<i>Private Study</i>		
Private Study	48	48

Aims of Module

To develop the practical skills of taking instructions, advising on testate and intestate succession, preparing wills, administering executries, trusts and curatories.

Mode of Delivery

Small group tutorials/seminars, role play, problem solving, drafting exercises and portfolio building

Assessment Plan

Learning Outcomes for Module

	Learning Outcomes Assessed
Component 1	1,6

On completion of this module, students are expected to be able to:

1. Interview and take instructions from a client, write to the client advising on basic matters in relation to estate planning, including the giving of simple tax planning advice and plan and draft a suitable will and testate documentation for a client taking account of the tax implications
2. Advise a client on matters in relation to intestate succession including prior rights and legal rights, identify the appropriate executor on intestacy and draft the related documents
3. Understand and apply the law of testate succession and interpretation of wills and administer an executry, demonstrate an awareness of the implications of income tax and capital gains tax on the executries and beneficiaries
4. Understand and explain the law on trusts including tax implications
5. Draft appropriate documentation for appointment of attorney or guardian and advise on options of executing living wills

Component 2	1,2,3,4,5,6
Component 3	1,2,3,4,5,6

Class participation comprising 10% of the weighting (C3)

Written coursework comprising 60% of the weighting (C2)

Role play comprising 30% of the weighting (C1)

Indicative Bibliography

1. GIBB, A. and GORDON, A., 2010. *Succession*. 3rd ed. Edinburgh: W. Green. (Law Basics series)
2. SCOBIE E.M., 2010. *Currie on confirmation of executors*. 9th ed. Edinburgh: Thomson/W. Green

Additional Notes

In addition to the text in the indicative bibliography, the student will be required to purchase the course materials.

6. Communicate by letter, telephone and email in a professional manner

Indicative Module Content

Interview skills, professional communication by letter writing, telephone and email, testate and intestate succession, drafting testamentary and intestate documents, tax planning, administering an executry, law of trusts, the law on incapacity, appointment of attorney or guardian, living wills