

<b>Module Title</b> <b>Private Client</b>	Reference	BSM559
	SCQF	SCQF
<b>Keywords</b> private client, wills, trusts, executries	Level	11
	SCQF Points	20
	ECTS Points	10
	Created	March 2004
	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### **This Version is No Longer Current**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.

#### **Corequisite Modules**

None.

#### **Precluded Modules**

None.

#### **Aims of Module**

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

#### **Learning Outcomes for Module**

#### **Indicative Student Workload**

	Full Time	Part Time
<i>Contact Hours</i>		
Assessment	12	12
Seminars/tutorials	80	80
<i>Directed Study</i>		
Directed Study	60	60
<i>Private Study</i>		
Private Study	48	48

#### **Mode of Delivery**

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

#### **Assessment Plan**

	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