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MODULE DESCRIPTOR

Module Title

Private Client

Reference	BSM559	Version	3
Created	February 2017	SCQF Level	SCQF 11
Approved	March 2013	SCQF Points	20
Amended	July 2017	ECTS Points	10

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

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
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

Module Delivery

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

Module Ref:	BSM559 v3

Indicative Student Workload	Full Time	Part Time
Contact Hours	52	52
Non-Contact Hours	148	148
Placement/Work-Based Learning Experience [Notional] Hours	N/A	N/A
TOTAL	200	200
Actual Placement hours for professional, statutory or regulatory body		

ASSESSMENT PLAN

If a major/minor model is used and box is ticked, % weightings below are indicative only.

Component 1

Type:	Coursework	Weighting:	30%	Outcomes Assessed:	1, 6
Description:	Role play exercises				

Component 2

Type:	Coursework	Weighting:	60%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	Written coursework exercise				

Component 3

Type:	Coursework	Weighting:	10%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	Class participation				

MODULE PERFORMANCE DESCRIPTOR

Explanatory Text

The Module is assessed by three components: C1 - Role play - 30% weighting. C2 - Coursework - 60% weighting. C3 - Class participation - 10% weighting. Module Pass Mark = Grade D (40%)

Module Grade	Minimum Requirements to achieve Module Grade:
A	At least 70% on weighted aggregate and at least 40% in each component
B	At least 60% on weighted aggregate and at least 40% in each component
C	At least 50% on weighted aggregate and at least 40% in each component
D	At least 40% on weighted aggregate and at least 40% in each component
E	At least 35% on weighted aggregate
F	Less than 35% on weighted aggregate
NS	Non-submission of work by published deadline or non-attendance for examination

Module Requirements

Prerequisites for Module	None.
Corequisites for module	None.
Precluded Modules	None.

ADDITIONAL NOTES

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

INDICATIVE BIBLIOGRAPHY

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