

This Version is No Longer Current
The latest version of this module is available [here](#)

MODULE DESCRIPTOR

Module Title

Private Client

Reference	BSM559	Version	4
Created	August 2021	SCQF Level	SCQF 11
Approved	March 2013	SCQF Points	20
Amended	September 2021	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

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:	70%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	Written coursework exercise				

Component 3

Type:	Coursework	Weighting:	0%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	Class participation				

MODULE PERFORMANCE DESCRIPTOR

Explanatory Text

The first grade represents Component 1 (coursework) weighted at minor (30%) and the second, Component 2 (coursework), weighted at major (70%). Component 3 is pass/fail competencies. Component 3 is a participation requirement with each student normally required to pass such on-campus activities as identified in the module. Non-submission of either component 1 or 2 or non-completion of the competencies will result in an NS grade. An overall minimum grade D is required to pass the module. Minimum Requirements to achieve Module Grade: C1:C2:C3

Module Grade	Minimum Requirements to achieve Module Grade:
A	A:A:Pass or B:A:Pass
B	A:B:Pass or A:C:Pass or B:B:Pass or C:A:Pass or C:B:Pass or D:A:Pass
C	A:D:Pass or B:C:Pass or B:D:Pass or C:C:Pass or D:B:Pass or D:C:Pass
D	C:D:Pass or D:D:Pass
E	A:E:Pass or A:F:Pass or B:E:Pass or B:F:Pass or C:E:Pass or C:F:Pass or D:E:Pass or E:A:Pass or E:B:Pass or E:C:Pass or E:D:Pass or E:E:Pass or F:A:Pass or F:B:Pass or F:C:Pass or F:D:Pass
F	D:F:Pass or E:F:Pass or F:E:Pass or F:F:Pass
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 SCOBIE E.M., 2010. *Currie on confirmation of executors.* 9th ed. Edinburgh: Thomson/W. Green