ROBERT GORDON UNIVERSITY ABERDEEN

MODULE DESCRIPTOR

Module Title

Private Client

Reference	LLM191	Version	3
Created	August 2023	SCQF Level	SCQF 11
Approved	September 2018	SCQF Points	20
Amended	August 2023	ECTS Points	10

Aims of Module

To develop the practical skills of taking instructions from clients, advising on testate and intestate succession, preparing wills, administering executries, preparing and advising on power of attorney documentation, guardianship and related applications. Developing a working knowledge of trusts and IHT matters.

Learning Outcomes for Module

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

1	Interview and take instructions from a client for preparation of wills. 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 other testamentary 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, distribution of the estate, identify the appropriate executor on intestacy and draft the related documents. Acquire knowledge of Bond of Caution.
3	Understand and apply the law of testate succession and interpretation of wills. Learn how to administer an executry, demonstrate an awareness of the implications of income tax and capital gains tax and Inheritance tax on the executries and beneficiaries. Gain awareness of the forms that are required in the winding up of an estate. Gain awareness of the exemptions and allowances available to estates.
4	Understand and explain the law on trusts including tax implications and be able to recognise the different types of trusts.
5	Draft appropriate documentation for appointment of attorney or guardians / intervenors. Be aware of the timescales surrounding these. Be aware of the role of the Office of the Public Guardian in Scotland. Have an ability to advise on options of executing advance medical directives and the requirements surrounding these.
6	Communicate with clients, solicitors and businesses by letter, telephone and email in a professional manner. Appreciate when the most appropriate time is to use each of the above methods. Have an awareness of the Law Society guidance relating to any/all of your areas of practice.

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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, advance medical directives.

Module Delivery

Small group tutorials/seminars, role play, problem solving, drafting exercises,forum postings, quizzes 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:	100%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	Role play and written coursework exercises				

Component 2

Type:	Coursework	Weighting:	0%	Outcomes Assessed:	1, 2, 3, 4, 5, 6
Description:	such online activities as are required to complete the participation element of the module				

MODULE PERFORMANCE DESCRIPTOR

Explanatory Text

The module is assessed by way of a single assessment component weighted at 100%. Additionally there is a participation requirement which is assessed on a pass/fail basis. Relative to the participation requirement each student is normally required to pass such online activities as identified in the module. Non-submission or non-completion of the competencies will result in an NS grade. An overall minimum grade D is required to pass the module.

Module Grade	Minimum Requirements to achieve Module Grade:
A	A:Pass
B	B:Pass
C	C:Pass
D	D:Pass
E	E:Pass
F	F:Pass
NS	Non-submission of work by published deadline or non-attendance for examination

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Module Requirements

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

ADDITIONAL NOTES

Currie on Confirmation is available on Westlaw therefore to all students who access the RGU website and pages. It is also available in our library. The course documentation is on the Moodle page. Students should refer to the styles etc posted, if advised to by their tutors.

INDICATIVE BIBLIOGRAPHY

1	GIBBS, A. and GORDON, A., LAW BASICS - SUCCESSION 2012. *Succession.*. most up to date ed. Edinburgh: W. Green. (Law Basics series)
2	SCOBBIE E.M., 2010. *Currie on Confirmation of executors.* 9th ed. Edinburgh: Thomson/W. Green