



SPRING 2026 COURSE SYLLABUS

Course Number: Law 330- R02

Course Title: Trusts & Estates (DE)

Credit Hours: 3

Grading Mode: Letter graded

Meeting Time(s): Mondays and Wednesdays 8:10 pm- 9:35 pm

Meeting Mode: Online

Exam Time(s): TBD

Exam Mode: On campus final exam

Prerequisite(s): n/a

Corequisite(s): n/a

Instructor(s):

Professor Chantelle DiLorenzo and Professor Elizabeth Parks

Contact Information and Office Hours:

cdilore@gmu.edu and mparks6@gmu.edu

Reading(s) & Supplement(s):

Wills, Trusts and Estates in Focus, Naomi R. Cahn; Alyssa DiRusso; Susan N. Gary (Second Edition)

Course Overview:

Trusts and Estates is one of the areas of law you are almost guaranteed to encounter on your bar exam. It is also, in the field, one of the more interesting practices of law as it intersects with so many other practice areas. This course is designed to provide a practical approach to the field of trusts and estates. We will be using Wills, Trust and Estates in Focus for this semester. Although rooted in caselaw and statute, our approach will be conversation-based to work outside the frame of the coursebook.

Course Learning Outcomes:

By the end of the semester, students should have acquired a working knowledge of trusts and estates, be conversant in this practice area and identify Virginia-specific

nuances, as well as be able to identify other areas of law that may overlap in the day to day practice of trusts and estates.

Grading Policies:

Participation %: 10

Midterm Exam/ Paper %: n/a

Final Exam/ Paper %: 90

Classroom Policies:

Attendance: Per AR 3-1.4, “maintenance of matriculation requires regular class preparation, participation and attendance, registration in the course of study required for the student’s program (full-time or part-time), successive registration for each fall and spring term of each academic year until study is completed, and compliance with all other relevant requirements.”

Absences: Per AR 4-1.1, “if a student is absent for any reason for more than 20 percent of the sessions of a course, the student is not eligible for credit in that course. A student who is not present for at least 75 percent of a session of the course is absent from that session.”

Participation & Preparation:

For participation and engagement, the grade will be based on your participation during the date(s) you are scheduled to be on-call, as well as voluntary participation other evenings. There will also be a pop quiz or poll each class as a way to confirm everyone is engaged; a timely response is required, though the content of your response is not graded.

Cameras are expected to be on for participation credit and for attendance. If you have an extenuating circumstance, please email both professors before class begins.

Use of Technology & AI:

Generative AI tools may be used in this course for the following purposes, and with the following guidelines: Students may use AI to brainstorm, outline, class preparation, and study, but may not use AI during class or during any exam. Students must use AI tools responsibly, verify facts presented by AI, disclose when AI tools are used to create course work product, properly cite any AI tools utilized, and should be prepared to produce the transcript of prompts and responses upon request. Misuse will be treated as a violation of academic standards.

Use of Electronic Textbooks During Exams:

Students are permitted one laptop computer for exam taking purposes. Additional laptop computers or any other electronic data storage devices are not allowed in an exam room, unless permitted by the course instructor's *written* exam instructions. Electronic textbooks (e-books) may be used during exams that are designated as open book by the instructor, and the instructor allows textbooks to be used during the exam and allows access to a student's computer files during the exam (open exam). E-books may not be used in exams where the instructor does not allow students to access their computer files during the exam (secure exam) even if the instructor permits access to textbooks. If the instructor has blocked access to the internet or computer files, you must bring a hard copy of the allowed textbook(s) you wish to consult. Students will need to borrow or otherwise locate a hard copy of the e-book or print resources needed from the e-book to take into the exam room. The instructor determines the length of the examination and whether or not it is secure or open and what, if any, study materials are permitted during the exam. Students are responsible for adhering to the instructor's standards for all examinations, which are included in the examination materials.

Course Schedule & Assignments

Week 1:

Date: Wednesday, January 14

Topic: Introduction to the Law and Practice of Trusts and Estates

Assignment(s): Chapter 1

Week 2:

Date: Monday, January 19

Topic: n/a

Assignment(s): No class- Martin Luther King Jr. Day

Date: Wednesday, January 21

Topic: Intestacy

Assignment(s): Chapter 2

Week 3:

Date: Monday, January 26

Topic: Intestacy, cont.

Assignment(s): Chapter 2

Date: Wednesday, January 28

Topic: Creation of Wills

Assignment(s): Chapter 3

Week 4:

Date: Monday, February 2

Topic: Creation of Wills, continued

Assignment(s): Chapter 3

Date: Wednesday, February 4

Topic: Amendment and Revocation of Wills

Assignment(s): Chapter 4

Week 5:

Date: Monday, February 9

Topic: Amendment and Revocation of Wills, cont.

Assignment(s): Chapter 4

Date: Wednesday, February 11

Topic: Wills- Construction and Interpretation

Assignment(s): Chapter 5

Week 6:

Date: Monday, February 16

Topic: Wills- Construction and Interpretation, cont.

Assignment(s): Chapter 5

Date: Wednesday, February 18

Topic: Will Contests

Assignment(s): Chapter 6

Week 7:

Date: Monday, February 23

Topic: Estate Administration and the Probate Process

Assignment(s): Chapter 14

Date: Wednesday, February 25

Topic: Estate Administration and the Probate Process, continued

Assignment(s): Chapter 14

Week 8:

Date: Monday, March 2

Topic: Family Protection

Assignment(s): Chapter 8

Date: Wednesday, March 4
Topic: Family Protection, continued
Assignment(s): Chapter 8

Week 9:

Date: Monday, March 16
Topic: Planning for Incapacity
Assignment(s): Chapter 7; Section D through end of chapter (p. 242-256);
Applying the Concepts question 5; Trusts and Estates in Practice questions 4 & 5

Date: Wednesday, March 18
Topic: Nonprobate Transfers
Assignment(s): Chapter 7; Intro through end of Section C (p.223-242); Applying
the Concepts questions 1-4; Trusts and Estates in Practice question 1

Week 10:

Date: Monday, March 23
Topic: Creation of Trusts
Assignment(s): Chapter 9

Date: Wednesday, March 25
Topic: Creation of Trusts, continued
Assignment(s): Chapter 9

Week 11:

Date: Monday, March 30
Topic: Modification and Termination of Trusts
Assignment(s): Chapter 11; Section B through end of chapter (p. 394-413);
Applying the Concepts question 6; Trusts and Estates in Practice question 3

Date: Wednesday, April 1
Topic: Fiduciary Duties
Assignment(s): Chapter 11; Intro and Section A (p.371-394); Applying the
Concepts questions 1-5; Trusts and Estates in Practice questions 1, 2 and 4

Week 12:

Date: Monday, April 6

Topic: Powers of Appointment

Assignment(s): Chapter 12; skip section 5. Exercise in Further Trust through BMO Harris case (p. 434- 439); skip Applying the Concepts questions 3 and 5

Date: Wednesday, April 8

Topic: Rights of Beneficiaries and Creditors in Trust Property

Assignment(s): Chapter 10

Week 13:

Date: Monday, April 13

Topic: Rights of Beneficiaries and Creditors in Trust Property, continued

Assignment(s): Chapter 10

Date: Wednesday, April 15

Topic: Introduction to Federal Estate and Gift Taxes

Assignment(s): Chapter 15; skip *Bandy* case

Week 14:

Date: Monday, April 20

Topic: Professional Ethics in Trusts and Estates

Assignment(s): Chapter 13; we will not discuss the Applying the Concepts questions in class but I will circulate the answer key over the weekend so if there are specific questions we can discuss during class time

Date: Wednesday, April 22

Topic: Review class

Assignment(s): n/a

Student Resources

[Antonin Scalia Law School Academic Regulations](#)

[GMU Common Course Policies Addendum](#)

[Mason Square Services](#)

[Mason Square Police](#)

Van Metre Hall, Room 110

Emergency - Dial 911

Escort Services - 703-993-8070

Dispatch – 703-993-2810

[Student Support and Advocacy Center \(SSAC\)](#)

Mason Square Sexual Assault Services:

Van Metre Hall, Room 222D

703-993-8186

Notice of Mandatory Reporting of Sexual Assault, Sexual Harassment, Interpersonal Violence, and Stalking:

As a faculty member, I am designated as a “Non-Confidential Employee,” and must report all disclosures of sexual assault, sexual harassment, interpersonal violence, and stalking to Mason’s Title IX Coordinator per University Policy 1202. If a student wishes to speak with someone confidentially, please contact one of Mason’s confidential resources, such as Student Support and Advocacy Center (SSAC) at 703-380-1434 or Counseling and Psychological Services (CAPS) at 703-993-2380. Students may also seek assistance or support measures from Mason’s Title IX Coordinator by calling 703-993-8730, or emailing titleix@gmu.edu.

[Mason Square Clinic](#)

Van Metre Hall, Room B102

703-991-2831

[Counseling and Psychological Services](#)

[Student Health Services](#)

[Student Disability Services](#)

[Student Conduct](#)

[University Life](#)