

Unit 3 Assignment: Drafting the Roadmap for the PR Client

Due Date: 11:59 p.m. EST, Sunday of Unit 3

Points: 100

Overview:

For this assignment, you will be using the skills you learned in the interviewing process in a letter to the client. In this letter, you will introduce yourself and your role, and briefly explain the initial stages of the estate administration process. Avoid copying the dialogue into your response, as this is a letter, not a conversation.

Instructions:

Let's assume the client in the fact pattern in this week's discussion board did not want to purchase the mother's house (in other words, forget about only those facts) and now has been appointed as the PR (Personal Representative). His name is Sam Sinclair, and his mailing address is 24 Clark Street, Simple City, CT. His mother's name was Eloise Sinclair.

Using the other facts in the fact pattern, draft a letter to the client briefly describing the *initial* probate process (do not explain the process from start to finish—choose the first few procedures necessary for getting the process started). Also, while describing each procedure, ask the client for any additional information that may be necessary to complete that procedure if we do not have all the information. Remember to include how you, as the legal assistant, will assist the PR in the various procedures.

Requirements:

- This letter should be a minimum of two (2) pages in length, single-spaced, using 12 pt. Times New Roman font.
- Be sure to use appropriate paragraph breaks and keep your writing free from spelling and grammatical errors.
- Use your textbook as a primary resource. You may use outside sources to *enhance* your answer.

Be sure to read the criteria by which your work will be evaluated before you write and again after you write.

Evaluation Rubric for *Drafting the Roadmap for the PR Client* Assignment

CRITERIA	<i>Deficient</i>	<i>Development Needed</i>	<i>Proficient</i>	<i>Exemplary</i>
	<i>0 - 35 points</i>	<i>36 - 47 points</i>	<i>48 - 53 points</i>	<i>54 - 60 points</i>
Content	Subject matter is minimally addressed. Opinions are offered, but arguments lack scholarly backing.	Subject matter is adequately addressed. Arguments are partially supported by scholarly research.	Subject matter is fairly well addressed. Arguments are supported by scholarly research but could be further elaborated with specific details.	Subject matter is thoroughly addressed. Arguments are well elaborated and fully supported by scholarly research and specific examples.
	<i>0 - 11 points</i>	<i>12 - 15 points</i>	<i>16 - 17 points</i>	<i>18 - 20 points</i>
Structure and Flow	Flow is poor. Paragraphing is inappropriate. Transitions are minimal or absent. Significant redundancy is evident.	Flow is adequate. Paragraphs may be too long or too short. Transitions are minimal, and redundancy is evident.	Flow is good. Paragraphing is mostly appropriate. Transitions are present, and redundancies are minimal.	Flow is excellent. Paragraphing is clear, and transitions are smooth and consistent. Inappropriate redundancies are absent.
	<i>0 - 5 points</i>	<i>6 - 7 points</i>	<i>8 points</i>	<i>9 - 10 points</i>
Scholarly Sources	Required scholarly sources are not used in the assignment.	Required scholarly sources are not included, and may not be well represented within the assignment.	Required scholarly sources are included, but content discussion is not well represented within the assignment.	Required scholarly sources are included. Scholarly source content is well represented within the assignment.
	<i>0 - 5 points</i>	<i>6 - 7 points</i>	<i>8 points</i>	<i>9 - 10 points</i>
Clear and Professional Writing and Proper Citation Format	Errors impede professional presentation; writing and formatting guidelines are not followed.	Numerous errors exist that interfere with a professional presentation.	Writing and formatting guidelines are being followed but have a few errors that do not impede professional presentation.	Writing and formatting guidelines are being followed and are clear, professional, with proper citation(s), and error-free.