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Course Outline

LEGAL OFFICE PROCEDURES

SPR-232

SCHEDULE FOR
LEGAL OFFICE PROCEDURES
SEMESTER IV

<u>Date (approx.)</u>	<u>Objective</u>	<u>Topic</u>	
Jan. 10 - 14 (1 week)	29	Legal Aid	
Jan. 17 - Feb. 4 (4 weeks)	30 - 35	Introduction to Real Estate	
Feb. 7 - Feb. 23 (3 weeks)	36 - 40	Mortgages and Charges	
Mar. 7 - 11 C 1 week)	41 T 43	Discharges and Cessations	
Mar. 14 → Apr. 8 (4 weeks)	44 o 49	Buying and Selling Real Estate	
Apr. 11 - 15 C 1 week)	50	Acting for the Mortgagee	#
Apr. 18 - 22 C 1 week)	51 r 52	Miscellaneous Documents	
Apr. 25 - 29 t 1 week)	53 ^ 54	Wills and Succession Duty	

OBJECTIVE 29 - Legal Aid

OBJECTIVE: The student will complete a Solicitor's Legal Aid Report (Form 10).

The student will understand and prepare an account ready for submission to the correct offices to accompany the said Form 10.

The student will complete an account for Duty Counsel in a Civil Matter in accordance with The Legal Aid Act.

APPLICATION: This objective is not in the workbook and a handout will be distributed by the instructor.

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO ACHIEVE: 6 periods of 50 minutes each

OBJECTIVE 30 r- Legal Description

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OBJECTIVE: The student will learn how to type metes and bounds descriptions in an acceptable form in accordance with legal typing principles.

The student will know the difference between the Registry Office system and the Land Titles system as they apply to the Province of Ontario.

APPLICATION: 1. Read pages 61 - 66 of text
2. Complete pages 89 - 92 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO ACHIEVE: 3 periods of 50 minutes each

OBJECTIVE 31 Affidavits T Planning Act
<? Land Speculation Act
r* Affidavit of Residence

OBJECTIVE: The student will understand the purpose of each of the Planning Act, the Land Speculation Tax Act and the Affidavit of Residence as it will apply to him/her in a legal office.

The student will be able to decide, given a set of facts, if each of the aforementioned affidavits are required in a document for registration in either the Registry Office or Land Titles Office.

APPLICATION: This objective is not in the text and a handout will be distributed by the instructor.

EVALUATION; All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 3 periods of 50 minutes each

OBJECTIVE 32 - Deed Without Dower

OBJECTIVE:

The student will understand the meaning of **the** dower clause and its affect on a deed **and** the supporting affidavits.

The student will complete three deeds without dower, together with all the pertinent affidavits, in proper legal form and be ready for registration in the Registry Office.

APPLICATION:

1. Read pages 67 *- 78 of text
2. Complete pages 95 - 100 of workbook

EVALUATION:

All work to be graded A, B, C or I

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ESTIMATED TIME
TO ACHIEVE:

8 periods of 50 minutes each

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OBJECTIVE 33 - Deed With Dower
- Transfer (Land Titles Act)

OBJECTIVE: The student will prepare a deed with dower in accordance with The Registry Act and in accordance with legal typing principles.

The student will prepare a land transfer under The Land Titles Act in accordance with legal typing principles.

APPLICATION: Complete pages 101 - 104 of workbook

EVALUATION: All work to be graded A, B, C or I

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ESTIMATED TIME TO ACHIEVE: 6 periods of 50 minutes each

OBJECTIVE 34 - TEST NO. 6

OBJECTIVE: The student will complete and pass a test of unpreviewed material.

APPLICATION: Test to be based on Objectives 30 - 33

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO ACHIEVE: 2 periods of 50 minutes each

OBJECTIVE 35 ◀ Deed- To Uses

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OBJECTIVE; The student will prepare a Deed To Uses in accordance with legal typing principles

The student will understand the meaning of a Deed To Uses and the function it performs in real estate.

- APPLICATION:
1. Complete page 105 of workbook
- Secretarial Judgment only
 2. Complete legal vocabulary - page 106 of workbook
 3. Complete handout to be distributed by instructor.

EVALUATION: All work to be graded A, B, C or I

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ESTIMATED TIME TO ACHIEVE: 2 periods of 50 minutes each

OBJECTIVE 36 - Repayment Clauses

OBJECTIVE: The student will understand the most common repayment clauses that he/she will encounter in a legal office with particular emphasis being put on the amortized clause and the blended payment clause.

APPLICATION: 1. Read pages 95 - 116 of text
2. Complete pages 107 - 110 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO ACHIEVE: 4 periods of 50 minutes each

OBJECTIVE 37 - Mortgage Without Dower

OBJECTIVE: The student will prepare two mortgages without dower and will be able also to insert the proper mortgage repayment clause in the mortgage together with any supporting affidavits which the student will decide are necessary.

APPLICATION: 1. Complete pages 111 and 112 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 5 periods of 50 minutes each

OBJECTIVE 38 r- Mortgage With Dower

OBJECTIVE: The student will complete mortgages with dower and will also be able to understand and complete the proper mortgage repayment clause which will be required for each of the mortgages. The student will also decide which supporting affidavits are required in order to prepare the documents for signature and eventual registration.

APPLICATION: Complete pages 113 and 114 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 5 periods of 50 minutes each

OBJECTIVE 39 - Charge Without Dower
- (Land Titles Act)

OBJECTIVE: The student will prepare a Charge in accordance with The Land Titles Act and in accordance with proper legal typing principles.

The student will decide on the proper repayment clause to be used in the document together with any supporting affidavits which may be required.

APPLICATION: Complete page 115 of workbook
Complete legal vocabulary - page 118 of workbook
Complete Secretarial Judgment - Page 119 of workbook

EVALUATION; All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 3 periods of 50 minutes each

OBJECTIVE 40 - TEST NO. 7

OBJECTIVE: The student will complete and pass a test on unpreviewed material.

APPLICATION: Test to be based on objectives 36-39

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 2 periods of 50 minutes each

OBJECTIVE 41 a) Discharge of Mortgage
 b) Discharge of Assignment of Mortgage
 c) Partial Discharge of Mortgage

OBJECTIVE: The student will understand the meaning of a discharge of mortgage, a discharge of mortgage and subsequent assignment and a partial discharge of mortgage.

The student will be able to complete each of the above in accordance with legal typing principles.

APPLICATION: 1. Study pages 118, 119, 129, 130 and 131 of text.
 Study also pages 135 - 137 of text
 2. Complete page 123 CE) of text

 3. Complete handout to be distributed by instructor for Discharge of Assignment of Mortgage and Partial Discharge of Mortgage.

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 4 periods of 50 minutes each

OBJECTIVE 42 - Cessation of Charge

OBJECTIVE: The student will understand the meaning of a Cessation of Charge under the Land Titles Act.

 The student will be able to complete a Cessation of Charge in accordance with legal typing principles,

APPLICATION: 1. Study pages 132 - 134 of text

 2. Complete Page 123 (T) of workbook

 Complete page 124 of workbook.

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 2 periods of 50 minutes each

OBJECTIVE" 43 - TEST NO. 8

OBJECTIVE: The student will complete and pass a test on unpreviewed material.

APPLICATION: Test to be based on objectives 41 and 42

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 2 periods of 50 minutes each

OBJECTIVE 44 - Statement of Adjustments

OBJECTIVE: The student will be able to complete a statement of adjustments setting out the purchase price, the deposit, any adjustments for fire insurance, taxes, local improvement charges, mortgages, rental, utilities, or any other adjustments which the instructor may feel are related to a statement of adjustments.

The student will be able to prepare an undertaking for readjustments in transactions when one is necessary.

APPLICATION: 1. Study pages 152 - 156 in text.
2. Complete pages 139 - 142 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 8 periods of 50 minutes each

OBJECTIVE 45 - Acting for the Vendor

OBJECTIVE: The student will understand an Agreement of Purchase and Sale and will be able to complete all documents and correspondence required for a simple sale transaction.

APPLICATION:

1. Study pages 133 - 145 of text-.
2. Complete pages 130 - 138 of workbook
3. Complete page 143 (A \$ B) of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 8 periods of 50 minutes each

- OBJECTIVE 46 - TEST NO. 9

OBJECTIVE: The student will complete and pass a test of unpreviewed material.

APPLICATION: Test will be based on objectives 44 and 4S

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 2 periods of 50 minutes each

OBJECTIVE 47 - Acting for the Purchaser

OBJECTIVE: The student will be able to prepare all the necessary documents and letters which will be required in a simple purchase transaction, including ordering a search of title, mortgage documents (if applicable), ordering of tax certificate and any other relevant material.

APPLICATION: Complete pages 125 - 129 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 8 periods of 50 minutes each

OBJECTIVE 48 - Reporting to Purchaser

OBJECTIVE: The student will prepare a complete reporting letter to the purchaser and will understand the meaning of a certificate of title. The student w4.11 also prepare the necessary account and trust statement, together with any insurance transfers.

APPLICATION: 1. Study pages 157 - 159 of text
2. Complete pages 143 (c) - 146 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 6 periods of 50 minutes each

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OBJECTIVE 49 - TEST NO. 10

OBJECTIVE: The student will complete and pass a test based on unreviewed material.

APPLICATION: Test to be based on objectives 47 and 48

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME
TO COMPLETE: 2 periods of 50 minutes each

OBJECTIVE 50 - Acting for the Mortgagee

OBJECTIVE: The student will complete all the documents **and** correspondence related to an actual application for a mortgage loan from the time it reaches the solicitor's office to the final report on title to the mortgagee.

APPLICATION: This objective is not in the textbook and a handout will be distributed by the instructor.

EVALUATION: **All** work to be graded A, B, C or I

ESTIMATED TIME TO ACHIEVE: 7 **periods** of 50 minutes each

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OBJECTIVE 51 - House Lease

OBJECTIVE: The student will understand the purpose of a lease and in particular, a house lease. The student will be able to calculate payment dates under a lease and will become familiar with some of the legal terminology.

APPLICATION: 1.. Study pages 160 - 166 of text
2. Complete pages 151 (a), page 155 and 156 of workbook

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO ACHIEVE: 2 periods of 50 minutes each

OBJECTIVE 52 - Chattel Mortgage

OBJECTIVE: The student will understand the meaning of a Chattel Mortgage and the required supporting affidavits. The student will also understand a Financing Change Statement and will be able to complete this accurately.

APPLICATION: This objective is not in the workbook and a handout will be distributed *by* the instructor. Study pages 167 - 184 of text.

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 3 periods of 50 minutes each



OBJECTIVE 53 - Will Clauses and Wills

OBJECTIVE: The student will understand basically some of the more common will clauses that are used in the preparation of a common will, i.e. opening clause; debts, duties and taxes clause; infants clause; investment clause; and others. These clauses will be set up in a way so that the student will be able to refer to them quickly in a precedent binder.

The student will prepare a short and a long will on proper will paper in accordance with proper legal typing principles.

The student will learn how a will is executed in proper form.

APPLICATION: 1. Study pages 267 - 274 of text
2. Complete pages 235 - 240 of text
OMIT - Codicil page 239

EVALUATION: All work to be graded A, B, C or I

ESTIMATED TIME TO COMPLETE: 6 periods of 50 minutes each

OBJECTIVE ⁵⁴ - Affidavit of Value and
Relatiojisni^

•* of Value and

OBJECTIVE:

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PLICATION: I Study pages ^{c 275} u* 281, 303 - 314
1. Complete Page 251 A, £

EVALUATION: Ail work to be graded A, B, C or I

ESTIMATED £ ME of 50 minutes e ach
TO COMPLETE. ^D V