Module Definition Form (MDF)

Module code: MOD008565	**Version:** 5 **Date Amended:** 03/Nov/2025

1. Module Title
Equity, Trusts and Succession

2a. Module Leader
Dan Burdge

2b. School
School of Economics, Finance and Law

2c. Faculty
Faculty of Business and Law

3a. Level
5

3b. Module Type
Standard (fine graded)

4a. Credits
30

4b. Study Hours
300

5. Restrictions

Type	Module Code	Module Name	Condition
Pre-requisites:	None		
Co-requisites:	None		
Exclusions:	None		
Courses to which this module is restricted:			

LEARNING, TEACHING AND ASSESSMENT INFORMATION

6a. Module Description

You'll be introduced to the concept of property, proprietary rights, as they are recognised and protected in equity, and explore the nature of the trust, including trusts formed under the laws of succession. We'll include an historical account of the development of and distinction between law and equity before examining the nature of equitable rights and remedies.

Over the module you'll gain a sound knowledge and understanding of equity and the law of trusts, succession including wills and intestacy rules, developing your critical analysis to suggest reasoned solutions to factual problems. It covers the importance in a legal practice, possibly as a commercial or family practitioner, of property, conveyancing and succession as well as fiduciary relationships, charitable status and trustee duties, formalities and mental capacity.

As this module fulfils part of the seven Foundations of Legal Knowledge, in alignment with the Bar Standards Board's requirement compensation is not permitted for this module.

6b. Outline Content

- Historical introduction; the distinction between common law and equity
- Evolution and modern significance of equitable principles
- The nature of equities and equitable proprietary interests
- The nature of the trust and of fiduciary obligations
- The creation of express trusts
- The office of trustee
- Administering the trust
- Purpose trusts and charities
- Resulting and constructive trusts
- Personal liability for breach of trust
- The recovery of property subject to a trust
- Equitable remedies, their nature and application
- The nature of a will and comparison with other forms of disposition
- Mutual wills
- Mental capacity
- Formalities
- The contents of a typical will
- Alteration and revocation of a will
- Rules of intestate succession
- Construction of wills
- Appointment of personal representatives and obtaining a grant of representation
- Collection of assets payment of debts and distribution to those entitled
- Rights powers and remedies of beneficiaries of wills and consequent trusts

6c. Key Texts/Literature

The reading list to support this module is available at: https://readinglists.aru.ac.uk/

6d. Specialist Learning Resources

None

7. Learning Outcomes (threshold standards)		
No.	**Type**	**On successful completion of this module the student will be expected to be able to:**
1	Knowledge and Understanding	Explain how legal rules, principles, doctrines, and institutions in equity, trusts and succession interact within wider social, political, commercial, and ethical contexts to balance competing interests;
2	Intellectual, practical, affective and transferrable skills	Analyse and compare a range of legal materials relating to equity, trusts and succession, and evaluate legal arguments, addressing ambiguity and uncertainty with developing independence and insight;
3	Knowledge and Understanding	Analyse and apply legal understanding to moderately complex scenarios, and construct reasoned and coherent solutions that consider both legal principles and practical outcomes;
4	Intellectual, practical, affective and transferrable skills	Communicate legal information and arguments effectively and coherently, using a logical structure, clear and reasoned expression, and appropriate academic and professional conventions, including consistent OSCOLA referencing;
5	Intellectual, practical, affective and transferrable skills	Collaborate effectively in a group by balancing roles, priorities, and diverse viewpoints, and evaluating how your individual contributions shaped the group's performance;
6	Intellectual, practical, affective and transferrable skills	Evaluate individual strengths, areas for improvement, and the influence of one's actions on outcomes, demonstrating growing self-awareness and accountability, and the ability to apply insights to improve future academic or professional practice.

8a. Module Occurrence to which this MDF Refers				
Year	**Occurrence**	**Period**	**Location**	**Mode of Delivery**
2026/7	ZZF	Template For Face To Face Learning Delivery		Face to Face

8b. Learning Activities for the above Module Occurrence			
Learning Activities	**Hours**	**Learning Outcomes**	**Details of Duration, frequency and other comments**
Lectures	0	N/A	N/A
Other teacher managed learning	47.5	1-6	2 x 1 hour tutor led workshop OR 2 x 1 hour lecture x 11 weeks (weeks 1-11) AND 2 x 1 hour student led workshop OR 2 x 1 hour tutorial x 11 weeks (weeks 1-11) PLUS 2 x 20min screencast x 10 weeks
Student managed learning	252.5	1-6	To include such things as watching screencasts, online discussion boards, VLE exercises, private study (guided and autonomous), tutorial preparation, assessment preparation and completion.
TOTAL:	300		

9. Assessment for the above Module Occurrence

The assessment for some modules includes a presentation (see below for details on how this particular module is assessed). We recognise that presenting, especially to a large group, can cause significant anxiety or distress for some students. If this may affect you, please contact your Module Leader or the Disability and Neurodiversity Service as early as possible. We will work with you to consider appropriate reasonable adjustments. Depending on your individual needs, these might include, for example, presenting to a smaller group or presenting only to a member of academic staff.

Assessment No.	Assessment Method	Learning Outcomes	Weighting (%)	Fine Grade or Pass/Fail	Qualifying Mark (%)
010	Coursework	1-5	50 (%)	Fine Grade	30 (%)
A written advisory opinion of up to 2500 words Compensation is not permitted for this module.					

Assessment No.	Assessment Method	Learning Outcomes	Weighting (%)	Fine Grade or Pass/Fail	Qualifying Mark (%)
011	Coursework	1,2,3,5,6	50 (%)	Fine Grade	30 (%)
A problem solving exercise up to 2500 words Compensation is not permitted for this module.					

In order to pass this module, students are required to achieve an overall mark of 40% (for modules at levels 3, 4, 5 and 6) or 50% (for modules at level 7*).

In addition, students are required to:
(a) achieve the qualifying mark for each element of fine graded assessment as specified above
(b) pass any pass/fail elements

[* the pass mark of 50% applies for all module occurrences from the academic year 2024/25 – see Section 3a of this MDF to check the level of the module and Section 8a of this MDF to check the academic year]