

	<p><b>WBL Competency 3: Client Relations</b>  <b>Outcome 3.1 – Identify and understand a client’s or service user’s position</b>  <i>(To be evidenced <b>twice</b>. You only need to choose <b>two</b> different examples from the list below. More than 1 piece of evidence can be provided for each example if required.)</i></p>
<p><b>Probate Practice Rights Outcome</b></p>	<p><b>Evidence Guidance:</b>                  To meet this Outcome you will need to show that you can identify/understand your client’s position. Within your logbook sheet you should explain your client’s position (e.g. their objectives/ situation) and explain how the evidence shows that you understood the client’s position.</p> <p>You should attach evidence of the client’s position and evidence that shows you understood their position (e.g. an attendance note, letter to client confirming instructions, evidence of action you took to act upon their instructions). Examples of the types of evidence you can provide, which could also meet the Practice Rights Learning Outcome are listed below.</p>
<p><b>SE3 – Drafting</b>  <b>LO1: Probate Papers</b>                  Draft and complete probate papers; that is papers which are to found or oppose a grant of representation</p>	<p>Include evidence of identifying the client’s position by understanding the client’s need to prepare or amend as required documents relating to the preparation of probate papers to include (but not restricted to):</p> <ul style="list-style-type: none"> <li>- Renunciations</li> <li>- Other applications pursuant to the non-contentious probate rules.</li> </ul>
<p><b>SE3 – Drafting</b>  <b>LO2: Wills</b>                  Draft and complete wills and ancillary documents</p>	<p>Include evidence of identifying the client’s position by understanding the client’s need to prepare or amend as required documents relating to the preparation of wills to include (but not restricted to):</p> <ul style="list-style-type: none"> <li>- Wills and codicils</li> <li>- Letters of wishes</li> <li>- Covering letters to clients.</li> </ul>
<p><b>SE4 – Managing Probate Activities</b>  <b>LO1: Demonstrate an ability to plan and manage probate activities effectively</b></p>	<p>Include evidence of identifying the client’s position during the following activity:</p> <ul style="list-style-type: none"> <li>- Actively manage case files to meet expectations of clients and beneficiaries whenever possible including the timely provision of interim payments if required.</li> </ul>