

Logbook

Name: [REDACTED]

Membership no: [REDACTED]

Learning Outcome: 3.1

**1. Competency: 3**

Identify and understand a client's or service user's position

**2. Evidence provided:**

Attendance note of conversation with client and subsequent email to the other side.

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**3. Outline how the evidence demonstrates you meet the outcome**

**Identify the client's position:** My client was selling a property as executor of her father. She did not live local and wanted to visit the property one last time before it was sold. The other side suggested completion between 5-7 February and I relayed this to my client for her instructions.

**Demonstrate understanding of the position:** The completion date must be agreed between all parties before exchange can take place.

**Evidence confirmation of identification and confirmation of the issues:** I took my Client's instructions on the dates suggested and she preferred 10<sup>th</sup> February which would give her an extra weekend to come down. I subsequently emailed the other side to suggest this and asked them to get back to me asap. I emailed them as I understood the urgency of the matter.

**4. Reflection and evaluation (what you learnt from the activity you undertook to meet the outcome). Note: you may want to complete this section at a later date once you have had time to reflect on your practice and experience.**

It is important to recognise a client's position and then to relay this to the other parties which would show that I am able to represent my client effectively.

**5. Completion date:**

31.01.2014

**6. Signed (applicant)**

[REDACTED SIGNATURE]

**Date:**

05.02.14

**7. Signed (supervisor)**

[REDACTED SIGNATURE]


**Date:**

17.09.14

Client	
Client Number	
Regarding	
Attending	Mrs [REDACTED]
Attended By	CPH
Date	31.1.14
Telephone Conversation	Telephone C:
Note Of	Interview
	10.30 <u>Made/Receiv</u>

explaining that the otherside have requested completion between 5-7 Feb I said I know she wanted visit property before it was sol she asked if it could be 10th Feb so that it gives her a bit of time to get down here. St said she could do 5-7th a a push if they really wanted she would just have to come d

Engaged		Hours	12	Minutes	Charge
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 this weekend. Re-order codes: Blue 766085 Pink 766074

[REDACTED]  
From:  
Sent:  
To:  
Subject:

[REDACTED]  
31 January 2014 10:40  
[REDACTED]

Dear [REDACTED],

Thank you for your letter of 30 January.

I have spoken to my client regarding the completion date and she would prefer 10<sup>th</sup> February if possible. My client wants to visit the property before completion and by completing on 10 February it would give her an extra weekend to come down (she doesn't live locally).

Please can you take your client's instructions and get back to me by the end of today if at all possible. I look forward to hearing from you.

Regards.

[REDACTED]  
Legal Assistant