

Logbook

Name: [Redacted]

Membership No: [Redacted]

<b>1. Competency:</b>  Self Awareness and Development	<b>Learning Outcome:</b>  7.2 Understand the limitations of your professional skills and knowledge
<b>2. Evidence provided:</b>  Email to client.	
<b>3. Outline how the evidence demonstrates you meet the outcome:</b> <ul style="list-style-type: none"> <li>• In this email I have identified that I do not have the skills required to provide the advice requested by the client</li> <li>• The email to the client demonstrates that I am aware of the limitations of my professional skills and knowledge. I have continued to advise and assist the client to keep the matter progressing in my supervisor's absence however I have informed the client that I will need my supervisor to deal with certain aspects as they are not within my knowledge</li> </ul>	
<b>4. Reflection and evaluation (what you learnt from the activity you undertook to meet the outcome):</b>  I learned that it is okay not to know everything and the client does not expect you to know everything! The client would much rather face a slight delay than receive advice from someone who is not experienced in certain aspects.	
<b>5. Completion date:</b>  5 November 2014	
<b>6. Signed (applicant)</b> [Redacted Signature]	<b>Date:</b> 5/11/14
<b>7. Signed (supervisor)</b> [Redacted Signature]	<b>Date:</b> 5/11/14

[REDACTED]

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**From:** L [REDACTED]  
**Sent:** 05 November 2014 16:29  
**To:** [REDACTED]  
**Subject:** FW:

Good afternoon

A [REDACTED] T [REDACTED] has asked me to keep an eye on this matter as he is away from the office for a few days, returning on Monday. Your email dated 4 November has been forwarded to me and I note that you wish to make some amendments to the draft letter.

I have amended the letter and a further draft is attached. You will see that I have added a paragraph about a signed form of acceptance being required although I have kept this quite vague as the exact wording of such an acceptance will need to be carefully considered by A [REDACTED]. I will also need to refer your query regarding whether a form of acceptance will safeguard you against other executors trying to claim to A [REDACTED] so that he can advise fully.

Please let me know if the letter is now approved and I will send it to Mr [REDACTED]. If, however, you would rather wait for A [REDACTED] to return to the office to discuss the position regarding the form of acceptance before the letter is sent then please let me know and I will bring it to his attention first thing on Monday.

I look forward to hearing from you.

Kind regards,

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**From:** [REDACTED]  
**Sent:** 04 November 2014 17:08  
**To:** A [REDACTED]  
**Cc:**  
**Subject:** RE:

Hi A [REDACTED]

I refer to recent correspondence on the above claim and the attached WP letter.

We can confirm that having reviewed this we are happy with the context of the letter however we feel that we should amend offer open to 30 days rather than 14 given that we have recommended the insured obtaining legal advice. In addition can we add a final paragraph regarding the procedure for accepting the offer? Will we be requesting a form of acceptance to be signed on behalf of the executors and will this safeguard us against other executors trying to claim? In addition we are not entirely sure as to when the estate first submitted the claim so can you please amend (highlighted in draft)?

Please can you provide a copy of the final letter issued as we will need to forward this to [REDACTED] who are reviewing the insured complaint?

Trust this makes sense however any problems then please let me know.

Many thanks for your assistance,

[REDACTED]  
 Assistant Claims Adjuster

17/04/2015