


ANNEX 3: Logbook Sheet

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|--|--|-----------------------------------|--|
| 1. Skills Element: Interviewing, advising and communicating | | Learning Outcome: Interviewing | |
| 2. Evidence provided: Attendance note of a call between client and myself. | | Page in Portfolio 1 | |
| 3. How does this meet the outcome? Evidence of interviewing the client to find out the necessary information relating to ownership and maintenance of the access to the property the client is proposing to sell. Using appropriate questions to find out how best to deal with the query as to the ownership and maintenance responsibilities and finding the solution to the problem. The attendance note shows a full and accurate record of the interview. Clear note of next steps in that the client has agreed he will provide a statutory declaration over the access area if needed and he is going to look for his mortgage account number and pass me to. I will then contact the lender. | | | |
| 4. Opportunities for further development (if any): N/A | | | |
| 5. Completion date: Call 06.01.2023 | | | |
| 6. Signed (applicant): | | Date: 04.07.2023 | |

ANNEX 3: Logbook Sheet

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|--|--|---|--|
| 1. Skills Element: Interviewing, advising and communicating | | Learning Outcome: Advising and communicating | |
| 2. Evidence provided: Report on title | | Page in Portfolio 2-29 | |
| 3. How does this meet the outcome? <p>The report on title sets out clear advice on all relevant matters arising after investigation of the title. I had already obtained relevant information to identify the client's objectives and this report is tailored to those clients (who are very sophisticated users of legal services) and their objectives.</p> <p>The report identifies the various options available and gives advice on those to enable the client to make decisions on how they wish to proceed including whether or not to take out an indemnity policy.</p> <p>The report is a full and complete record of the advice given to the client and gives them clear advice about the next steps such as transferring the deposit and signing the contract.</p> | | | |
| 4. Opportunities for further development (if any): | | | |
| 5. Completion date: 31.03.2023 | | | |
| 6. Signed (applicant): | | Date: 04.07.23 | |

ANNEX 3: Logbook Sheet

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|--|--|--|----------------------------|
| 1. Skills Element: Costs and funding | | Learning Outcome: Costs and funding | |
| 2. Evidence provided: Client care letter | | | Page in Portfolio 30-35 |
| 3. How does this meet the outcome? This letter gives clear and accurate calculation of costs that the client will incur in the conveyancing transaction. This includes an estimate of fees, the disbursements including Stamp Duty Land Tax, Land Registration fees and details of the transactions including the purchase price. | | | |
| 4. Opportunities for further development (if any): N/A | | | |
| 5. Completion date: 26.06.2023 | | | |
| 6. Signed (applicant):  | | | Date: 04.07.2023 |

ANNEX 3: Logbook Sheet

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|---|--|--|--|
| 1. Skills Element: Professional conduct and ethics | | Learning Outcome: Professional conduct and ethics | |
| 2. Evidence provided: Letter to client when acting for both sides of a transaction. | | Page in Portfolio 36-37 | |
| 3. How does this meet the outcome? When acting for both sides of a transaction, seller and purchaser, there is an obvious risk that a conflict of interest may arise. The letter was sent to my clients to advise them of the potential for a conflict and to seek their authority to represent both sides. This also advises them of the relevant Solicitors Regulation Authority Rules as to why we are seeking their authority. | | | |
| 4. Opportunities for further development (if any): | | | |
| 5. Completion date: 26.06.2023 | | | |
| 6. Signed (applicant): | | Date: 04.07.2023 | |

ANNEX 3: Logbook Sheet

Sub-Topic: 2023

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|---|--|------------------------------------|-------------------------|
| 1. Skills Element: Managing conveyancing work | | Learning Outcome: File handling | |
| 2. Evidence provided: Diary print out. | | | Page in Portfolio 38 |
| 3. How does this meet the outcome? Shows that time has been allocated to manage my workload during the day and this includes a wide range of matters to ensure timely progress. The diary shows SDLT deadlines being entered to ensure I am aware of these. | | | |
| 4. Opportunities for further development (if any): N/A | | | |
| 5. Completion date: Diary is for tomorrow - 05/07/2023 | | | |
| 6. Signed (applicant): | | | Date: 04/07/2023 |

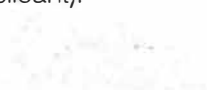
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| 1. Skills Element: Managing conveyancing work | | Learning Outcome: Dealing with other professionals | |
| 2. Evidence provided: Email to surveyor asking him to amend a plan produced for a mutual client. | | Page in Portfolio 39 | |
| 3. How does this meet the outcome? Email evidences communication in writing with other professionals including instructing the expert. | | | |
| 4. Opportunities for further development (if any): | | | |
| 5. Completion date: 05.05.2023 | | | |

ANNEX 3: Logbook Sheet

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| 1. Skills Element: Legal writing and drafting | | Learning Outcome: Effective letter writing | |
| 2. Evidence provided: Letter to a client with a draft transfer deed for the clients to advise on. | | | Page in Portfolio 40 |
| 3. How does this meet the outcome? The letter is written in plain English and the letter is accurate and succinct to set out the issues following earlier emails. The letter clearly sets out the information and is written in a style so as to be familiar to the client who is a longstanding client and is a very sophisticated user of legal services. | | | |
| 4. Opportunities for further development (if any): | | | |
| 5. Completion date: 22.03.2023 | | | |
| 6. Signed (applicant): | | | Date: 04.07.2023 |

ANNEX 3: Logbook Sheet

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|--|--|-------------------------------|--|
| 1. Skills Element: Legal writing and drafting | | Learning Outcome: Drafting | |
| 2. Evidence provided: Transfer (TR1) | | Page in Portfolio 41-44 | |
| 3. How does this meet the outcome? This shows I can correctly draft and complete the transfer form which is one way of transferring property in a conveyancing transaction. | | | |
| 4. Opportunities for further development (if any): N/A | | | |
| 5. Completion date: 16.06.2023 | | | |
| 6. Signed (applicant):  | | Date: 04.07.2023 | |

ANNEX 3: Logbook Sheet

Signature: X (applicant)

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|---|--|----------------------------------|--------------------------------|
| 1. Skills Element: Negotiation | | Learning Outcome: Negotiation | |
| 2. Evidence provided: Tracked changes Transfer showing negotiation on various clauses and an attendance note with the client showing instructions. | | | Page in Portfolio 45-60 |
| 3. How does this meet the outcome? This shows negotiations of amendments to a Transfer Deed with the drafting between the seller's solicitor and myself and the attendance note with the client taking instructions on the drafting. | | | |
| 4. Opportunities for further development (if any): N/A | | | |
| 5. Completion date: 24.02.2023 and 15.03.2023 | | | |
| 6. Signed (applicant): | | | Date: 04.07.2023 |