

<p>1. Skills Element:</p> <p>Drafting</p>	<p>Learning Outcome:</p> <p>Probate Papers</p>
<p>2: Evidence provided</p> <p>Form IHT400 and supporting schedules.</p> <p>Affidavit (statement of truth) in support of application for grant of probate.</p>	<p>Page in Portfolio:</p> <p>1.</p> <p>45.</p>
<p>3. How does this meet the outcome?</p> <p>The inheritance tax account shows ability to draft the required documents to report a complex estate to HM Revenue & Customs as part of the application for a grant of probate.</p> <p>The affidavit demonstrates the skill needed to draft statements in support of applications for grants of probate where the condition of the Will may be questioned by the probate court, in compliance with the Non Contentious Probate Rules 1987.</p>	
<p>4. Opportunities for further development (if any):</p>	
<p>6. Signed (applicant):</p>	

1. Skills Element: Drafting	Learning Outcome: Wills
2: Evidence provided Will.	Page in Portfolio: 47.
3. How does this meet the outcome? I chose this Will as the instructions from the client were relatively complex, requiring the drafting of clauses for specific gifts, pecuniary gifts, and a contingent gift of money conditional upon the legatee caring for the testator's pet. The residuary clause also had pecuniary legacies, which is quite unusual.	
4. Opportunities for further development (if any): I do not get much opportunity to draft Wills in my current role so I am attending a Will-drafting seminar in November 2023 to address this.	
6. Signed (applicant):	

<p>1. Skills Element:</p> <p>Managing Probate Activities</p>	<p>Learning Outcome:</p> <p>Demonstrating an ability to plan and manage probate activities effectively.</p>
<p>2. Evidence provided</p> <p>Workload Excel spreadsheet.</p> <p>Letter to beneficiary detailing update of case management and proposing interim distribution.</p>	<p>Page in Portfolio:</p> <p>66 .</p> <p>69 .</p>
<p>3. How does this meet the outcome?</p> <p>My rolling workload spreadsheet shows how I manage multiple cases being at different stages of administration at any given date, and records key dates and outstanding tasks which enables me to plan and prioritise probate activities accordingly. Actions are deleted as they are carried out and where time is of the essence, and a deadline is absolute, I highlight these in yellow so as to bring them to my attention and to assist me to work towards the deadline.</p> <p>Letter to charity beneficiary shows evidence of keeping residuary beneficiaries appropriately updated as to recent case management activities undertaken, current position of the estate, and demonstrates rationale for making interim payment.</p>	
<p>4. Opportunities for further development (if any):</p>	
<p>5. Completion Date:</p>	
<p>6. Signed (applicant):</p>	<p>Date:</p>

<p>1. Skills Element:</p> <p>Managing Probate Activities</p>	<p>Learning Outcome:</p> <p>Demonstrate an ability to assemble all materials relevant to the matter in hand, in accordance with its requirements.</p>
<p>2. Evidence provided</p> <p>Pre-lodgement enquiry email to District Registry dated 6 April 2023 (with attachments form PA18 pre-lodgement, form PA1A draft grant application, draft affidavit (not showing exhibits for data protection).</p> <p>Letter to GP requesting completion of form PA14, dated 19 May 2023.</p> <p>Attendance note to GP surgery dated 5 June 2023.</p> <p>Attendance note to GP surgery dated 15 June 2023.</p> <p>Form PA14 signed by GP.</p>	<p>Page in Portfolio:</p> <p>72. to 97.</p> <p>99.</p> <p>100.</p> <p>101.</p> <p>102.</p>
<p>3. How does this meet the outcome?</p> <p>Where a grant application is complex, it is sometimes necessary to obtain the registrar's directions by way of a pre-lodgement enquiry to the probate court. The evidence provided shows the relevant documents were prepared and collated and submitted to the registrar.</p> <p>The registrar subsequently requested further information and it was necessary to prepare the prescribed pro forma (form PA14) and ask the relevant professional (General Practitioner) to sign the document. The evidence shows how this was achieved, by writing to the GP and timely following up to elicit the signature.</p>	
<p>4. Opportunities for further development (if any):</p>	
<p>6. Signed (applicant):</p>	

<p>1. Skills Element:</p> <p>Managing Probate Activities</p>	<p>Learning Outcome:</p> <p>Demonstrate an ability to instruct other professionals.</p>
<p>2. Evidence provided</p> <p>Email to genealogist to locate missing residuary beneficiaries.</p> <p>Email to RICS surveyor to provide HMRC-compliant report on property and land value.</p> <p>Memo to internal professional (head of Trust and Tax team) instruction reporting of Capital Gains Tax to HM Revenue & Customs.</p>	<p>Page in Portfolio:</p>
<p>3. How does this meet the outcome?</p> <p>Both emails to external professionals show ability to give clear instructions and use friendly but professional language as I have good working relationships with these and many other professionals in different fields, as well as the legal field.</p> <p>The internal memo shows I have identified a need to delegate work to an internal professional with a different area of expertise.</p>	
<p>4. Opportunities for further development (if any):</p>	
<p>5. Completion Date:</p>	