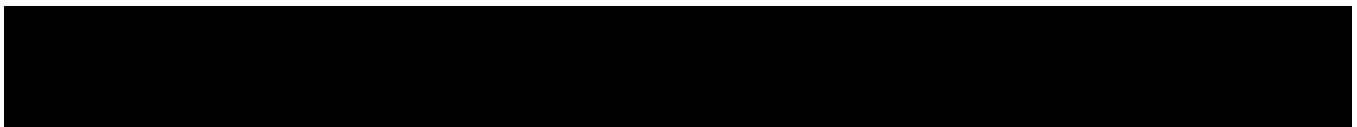


WBL Logbook Sheet Template



e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	Page numbers from portfolio
3.2 (1) Take accurate instructions relating to a legal matter from clients or service users	155-161
Evidence provided and date of evidence	
e.g. Letter to client dated 01.01.2020	
Telephone attendance note dated 01.01.2020	
Attendance note date 13.10.2022	
Email to client dated 18.10.2022	
Email from client dated 20.10.2022	
Letter to wife's solicitor dated 20.10.2022	
Explain how the example meets the learning Outcome and how the evidence shows this	
<p>Use appropriate listening and questioning techniques and take accurate instructions from your client or service user.</p> <p>I was acting for a client in connection with ongoing financial remedy proceedings. My client was vacating the family home. In order to avoid a dispute regarding contents of the family home, I arranged a telephone call with my client in order to identify which items he wanted to remove and take with him when he vacated. The wife had requested a full inventory. I called the client and using appropriate questioning techniques, I asked him to take me through each room in the house so that we could put together a list of items which he wanted to take with him. Please refer to the attendance note dated 13.10.2022.</p>	
<p>Confirm with your client/service user that your understanding of the instructions is correct</p> <p>Following our phone call, I drafted a letter to be sent to wife's solicitor setting out the proposed inventory of items which my client wished to take with him. I asked the client to carefully review the inventory and ensure that nothing had been missed off.</p>	

He then confirmed that he was happy for my draft letter and inventory to be sent. Please refer to the email from the client, and the finalised letter which was sent to wife's solicitor.

Provide evidence of both taking the instructions and confirming the instructions with your client/service user

Please refer to the email from the client, and the finalised letter which was sent to wife's solicitor.

Reflection and evaluation

Describe what you learnt from the activity you undertook to meet the Learning Outcome. You may want to complete this section at a later date once you have had time to reflect on your practice and experience.

Taking accurate instructions is imperative in order to represent a client. Incorrectly understanding the client's instructions could lead to potential issues, hence why it is important to double check that you have understood your client's instructions before acting on them, and ensuring that you had a detailed note.

Supervisor's Name

Please print the full name of the supervisor that supervised the work referred to above within this logbook sheet and the supporting evidence.

██████████

Tel call with [REDACTED] 13.10.2022 - 2pm

Referring client to the correspondence received from W solicitors – asking client which items he wanted to remove from family home

Asking client to take me through each room in the house which contains items he wants to remove. Agreeing proposed list of belongings for him to take...

KITCHEN

1. Cutlery (gift from parents for 21st) –
2. Kitchen knives etc – gift to H from parents

GARAGE

1. Tools – box of assorted tools
2. X2 drills
3. Wellies
4. Stepstool
5. Garden rakes/forks/spade if any spares
6. Sledgehammer and pickaxe
7. Ivy scraper
8. Stepladder
9. Set of long ladders
10. Glass garden table (mother's garden furniture)
11. Camping equipment

BEDROOMS

1. Personal belongings
2. Laptop and computer equipment
3. Hard drive
4. Old PC (former family PC) – contains old bank account details etc so needs to be disposed properly

LIVING ROOM

1. White leather recliner

STUDY

1. Gaming chair

LOFT

1. Believe have taken everything needed save for wet suit

In her correspondence, W has offered H: -

1. Bed – to remain at FMH
2. The living room sofas – to remain at FMH
3. His shelves from the study – to remain at FMH
4. Petrol mower - undecided
5. Half of the Denby china – to remain at FMH

Explaining to client that I would draft a response to W's solicitor incorporating the attached and send to him for his approval

Asking client whether he can provide W with photos of [REDACTED] – client says that they are in storage – can obtain them after 26 Oct and provide W with full run of photos

Time taken – 3 units

[Redacted]

Subject: Inventory [Redacted]
Date: 18 October 2022 09:55:00
Attachments: [Redacted]

- [image001.png](#)
- [image002.png](#)
- [image003.png](#)
- [image004.png](#)
- [image005.png](#)
- [image006.jpg](#)
- [image007.jpg](#)
- [image008.png](#)

[Redacted]

Dear [Redacted]

Please find attached draft letter to [Redacted] solicitor regarding the inventory. I also enclose the inventory for your review.

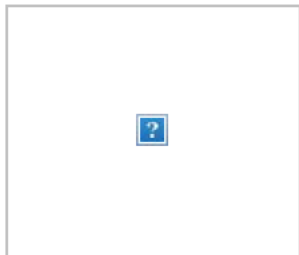
Please carefully review and add anything which you would like to take with you, that I may have missed.

If approved, please let me know and I will send to [Redacted] solicitor.

I will email you separately regarding your replies to [Redacted] further questionnaire.

Best wishes

[Redacted]



[Redacted]

[REDACTED]

From: [REDACTED]

Sent: 20 October 2022 18:20

To: [REDACTED]

Subject: Re: Replies to [REDACTED] questionnaire [REDACTED]

Attachments: [REDACTED]

This Message originated from outside of your organisation.

Hi [REDACTED]

I agree to the contents of the document you have written as a response except perhaps we should say the [REDACTED] is provisional until I have had the chance to look at in more details as per my email yesterday ? (though I am sure your calculations will prove to be correct anyway).

Attached is my updated inventory as it is now so it may be worth attaching that version instead.

Kind regards

[REDACTED]

Date: Thursday, 20 October 2022 at 15:35

Hi [REDACTED]

I hope you are well and thank you for the below.

[REDACTED]

[REDACTED]

Regarding contents of the family home, are you okay for us to send the attached letter with the inventory which includes provision for anything else to be included if necessary?

I look forward to hearing from you.

Best wishes

[REDACTED]

Our Reference:

[REDACTED]

Your Reference:

[REDACTED]

BY EMAIL ONLY – [REDACTED]

20 October 2022

Dear Sirs

[REDACTED]

We write further to your correspondence of 13 October 2022.

Inventory

Please find enclosed inventory of items which our client shall be taking with him to [REDACTED] when he temporarily vacates. Please note that the enclosed inventory is not exhaustive, and should our client wish to collect further items from the family home then he will either liaise with your client directly, or we will be in contact with you.

We trust that the enclosed inventory will not be contentious and look forward to receiving your client's confirmation that the items are agreed.

Photographs of [REDACTED]

Your client has requested that our client provide copy photographs of [REDACTED]

We understand that there are three discs which are currently located at the lock and store in [REDACTED]. Once our client has moved into [REDACTED], after 26 October, he will provide your client with a portable hard drive which contains all of the photos of [REDACTED] and the family. Your client will need to sort through the photographs herself.

Yours faithfully

[REDACTED]

KITCHEN

1. Cutlery (gift from parents for 21st)
2. Kitchen knives etc – originally from parent's house

GARAGE

1. Tools – box of assorted tools
2. x2 drills
3. Wellies
4. Large stepstool
5. 1x spare garden fork, spade, rake, 'loppers'
6. Sledgehammer and pickaxe
7. Ivy scraper
8. Set of long ladders
9. Bow saw
10. Chain Saw
11. Bill hook
12. Camping equipment
13. Bicycle
14. Spare bicycle pump
15. Tarpaulins x2

Shed

2x garden chairs

BEDROOMS

1. Personal belongings
2. Laptop and computer equipment
3. Hard drive
4. Old PC (former family PC) – contains old bank account details etc so needs to be disposed properly
5. Duvet, pillows x2, duvet, pillow covers x1 set, mattress protector x1

LIVING ROOM

1. White leather recliner

STUDY

1. Gaming chair
2. Personal items, technical manuals

LOFT

1. I believe have taken everything needed save for my wet suit and travel wheelie

OFFER BY W – CORRESPONDENCE OF 13.10.2022

1. Bed – to remain at FMH
2. The living room sofas – to remain at FMH
3. His shelves from the study – to remain at FMH
4. Petrol mower - undecided
5. Half of the Denby china – to remain at FMH
6. Glass garden table (mother's garden furniture) – to remain at family home