

Outcomes Matrix

To help you with your selection of evidence to meet the outcomes, we have created a matrix [here](#).

Using the Outcomes Matrix

For example, if you are working on your evidence for **WBL Outcome 1.1**:

1. Look across the WBL axis of the Matrix for Outcome 1.1
2. By reading the vertical Practice Rights column, the matrix suggests using the following examples from your cases:
 - a. The oath
 - b. Affidavits
 - c. Renunciations
 - d. Wills and codicils
 - e. Letters of wishes
 - f. Covering letters to clients
 - g. Instructions for execution of a will or codicil

And more....
3. Select the **two** examples which you think best demonstrate your competence in applying the law to a matter (WBL Outcome 1.1)

Remember

You only need to provide **two examples** for most WBL outcomes.

Only **one example** is required for Outcomes 4.2, 4.3, 5.1, 5.2, 6.3, 7.1 & 7.2. These columns for these have been highlighted in purple.

Practice Rights Evidence	1.1	1.2	1.3
SE: Drafting			
LO1 – Probate Papers			
The Oath	x	x	
Wills, affidavits and supporting evidence		x	
Supporting evidence as required (affidavits or statements)	x	x	
Renunciations	x		
Applications for caveats, citations and standing searches		x	x
Other applications pursuant to the non-contentious probate rules		x	x
Covering letters in support		x	
LO2 – Wills			
Wills and codicils	x		
Letters of wishes	x		
Covering letters to clients	x		
Instructions for execution of a will or codicil	x		
Letters to others ancillary to will preparation such as medical practitioners, accountants and other professionals			x
LO3 – Administration of Estates			
Statutory notices		x	x
Letters to asset holders and documents necessary to realise assets			x
Tax returns and information for beneficiaries		x	

Outcomes Matrix – Probate PR – Drafting

(The Outcomes shaded in purple only require one item of evidence)

Practice Rights Learning Outcome: Drafting	WBL Outcomes																											
	1.1	1.2	1.3	1.4	2.1	2.2	2.3	2.4	2.5	3.1	3.2	3.3	3.4	3.5	3.6	4.1	4.2	4.3	5.1	5.2	6.1	6.2	6.3	7.1	7.2	8.1	8.2	
LO1 – Probate Papers																												
1.1: The Oath	x	x		x								x																
1.2: HMRC accounts and supporting schedules		x		x																								
1.3: Supporting evidence as required (affidavits or statements)	x	x		x																								
1.4: Renunciations	x									x				x														
1.5: Applications for caveats, citations and standing searches		x	x	x																								
1.6: Other applications pursuant to the non-contentious probate rules		x	x	x						x		x		x														
1.7: Covering letters in support		x			x																							
LO2 – Wills																												
2.1: Wills and codicils	x									x	x	x																
2.2: Letters of wishes	x									x	x																	
2.3: Covering letters to clients	x				x	x	x			x	x		x		x								x					
2.4: Instructions for execution of a will or codicil	x										x											x						
2.5: Letters to others ancillary to will preparation such as medical practitioners, accountants and other professionals			x		x	x	x	x	x																			x
LO3 – Administration of Estates																												
3.1: Statutory notices		x	x	x							x			x														
3.2: Letters to asset holders and documents necessary to realise assets			x			x	x	x	x					x														
3.3: Tax returns and information for beneficiaries		x			x							x											x					
3.4: Assents, transfers and other documents to transfer title		x	x	x										x														
3.5: Post-death disclaimers and variations			x	x							x			x														
3.6: Estate and (where relevant) trust accounts				x								x																
3.7: Letters to personal representatives and trustees, beneficiaries, creditors and others	x		x		x	x	x	x	x			x	x										x					

Outcomes Matrix – Probate PR – Managing Probate Activities

(The Outcomes shaded in purple only require one item of evidence)

Practice Rights Learning Outcome: Managing Probate Activities	WBL Outcomes																											
	1.1	1.2	1.3	1.4	2.1	2.2	2.3	2.4	2.5	3.1	3.2	3.3	3.4	3.5	3.6	4.1	4.2	4.3	5.1	5.2	6.1	6.2	6.3	7.1	7.2	8.1	8.2	
LO4 – Plan and manage activities																												
4.1: Allocate time and resources appropriately																	x											
4.2: Adopt and maintain an appropriate case strategy																	x	x										
4.3: Be aware of procedural requirements and time limits including relevant directions, rules and regulations	x	x									x	x				x	x											
4.4: Actively manage case files to meet expectations of clients and beneficiaries whenever possible including the timely provision of interim payments if required									x						x	x						x						
4.5: Properly comply with relevant accounting requirements relating to the handling of funds																						x						
LO5 – Assemble all materials																												
5.1: Identify relevant law and procedural rules	x																x	x										
5.2: Identify and efficiently locate and collate all relevant documents								x									x	x										
5.3: Identify the need to update information as required by the relevant law and procedure																	x	x										
5.4: Commission reports, valuations and other information from experts such as agents and valuers			x				x	x									x											
5.5: Recognise the need to act without undue delay in the preparation of documents including (but not restricted to) wills																x	x	x										

Outcomes Matrix – Probate PR – Skills Element 4 (Managing Probate Activities) – LO3

(The Outcomes shaded in purple only require one item of evidence)

Practice Rights Learning Outcome: Managing Probate Activities	WBL Outcomes																											
	1.1	1.2	1.3	1.4	2.1	2.2	2.3	2.4	2.5	3.1	3.2	3.3	3.4	3.5	3.6	4.1	4.2	4.3	5.1	5.2	6.1	6.2	6.3	7.1	7.2	8.1	8.2	
LO6 – Instruct other professionals																												
6.1: Appreciate the nature and function of different types of experts and agents relevant to probate activities							x													x							x	
6.2: Identify when it is appropriate to instruct an expert or agent including when a specialist legal opinion is required							x													x							x	
6.3: Be familiar with the available registers, databases and organisations through which an appropriate expert or agent may be identified and located			x																								x	
6.4: Understand any relevant statutory requirements to ensure that an expert or agent is instructed properly and is suitably qualified and experienced																											x	
6.5: Identify when it is appropriate to delegate work and any relevant law or procedure which may limit the right or power to delegate																												
6.6: Agree an appropriate fee for work to be carried out by an expert or agent																											x	
6.7: Draft instructions to an expert or agent							x																				x	
6.8: Deal with any expert or agent in a professional manner																											x	