

	<p><b>WBL Competency 3: Client Relations</b>  <b>Outcome 3.2 – Take accurate instructions relating to a legal matter from clients or service users</b>  <i>(To be evidenced <b>twice</b>. You only need to choose <b>two</b> different examples from the list below. More than 1 piece of evidence can be provided for each example if required.)</i></p>
<p><b>Probate Practice Rights Outcome</b></p>	<p><b>Evidence Guidance:</b>                  To meet this Outcome you will need to show that you can take accurate instructions from your client, which you then check with your client are correct. Within your logbook sheet you should explain how you obtained the client’s instructions and how you confirmed these were accurate.</p> <p>You should attach evidence of both taking instructions <b>and</b> confirming those instructions with your client (e.g. attendance note with the client taking instructions and then a letter to a client confirming instructions). Examples of the types of evidence you can provide, which could also meet the Practice Rights Learning Outcome are listed below.</p>
<p><b>SE3 – Drafting LO2: Wills</b>                  Draft and complete wills and ancillary documents</p>	<p>Include evidence of taking accurate instructions in respect of the preparation and amendment of documents (as required) relating to the preparation of wills to include (but not restricted to):</p> <ul style="list-style-type: none"> <li>- Wills and codicils</li> <li>- Letters of wishes</li> <li>- Covering letters to clients</li> <li>- Instructions for execution of a will or codicil.</li> </ul>
<p><b>SE3 – Drafting LO3: Administration of Estates</b>                  Draft and complete documents required in the administration of an estate</p>	<p>Include evidence of taking instructions in respect of drafting the following;</p> <ul style="list-style-type: none"> <li>- Statutory notices</li> <li>- Post-death disclaimers and variations.</li> </ul>