

	<p><b>WBL Competency 3: Client Relations</b>  <b>Outcome 3.4 – Evaluate the risks, costs and benefits of alternative courses of action</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 provide your client with an evaluation of the risks, costs and benefits of alternative courses of action open to them. Within your logbook sheet you should explain the alternative courses of action that you have put to the client, and explain the risks, costs and benefits of <u>each</u> of those alternative courses of action.</p> <p>You should attach evidence of your communication of the options <u>and</u> the risks, costs and benefits of each of the options you put to the client. 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</b>  <b>LO2: Wills</b>                  Draft and complete wills and ancillary documents</p>	<p>Include evidence of</p> <ul style="list-style-type: none"> <li>- Covering letters to clients, where it can be seen that you have advised them of alternative courses of action including evaluation of those options in respect of will preparation.</li> </ul>
<p><b>SE3 – Drafting</b>  <b>LO3: Administration of Estates</b>                  Draft and complete documents required in the administration of an estate</p>	<p>Include evidence of</p> <ul style="list-style-type: none"> <li>- Letters to personal representatives and trustees, beneficiaries, creditors and others where it can be seen that you have advised them of alternative courses of action (including evaluation of those options) in respect of the administration of an estate.</li> </ul>
<p><b>SE4 – Managing Probate Activities</b>  <b>LO1: Demonstrate an ability to plan and manage probate activities effectively</b></p>	<p>Include evidence of advising the client of:</p> <ul style="list-style-type: none"> <li>- Procedural requirements and time limits including relevant directions, rules and regulations and evaluating any options to the client (if relevant) e.g. distribution of the assets within a time period of the date of the grant of probate or advising of statutory notices. (This could be evidenced in support of any of the Probate Practice Learning Outcomes mentioned above).</li> </ul>