

	<p>WBL Competency 3: Client Relations Outcome 3.6 – Manage a client’s or service user’s expectations <i>(To be evidenced twice. You only need to choose two different examples from the list below. More than 1 piece of evidence can be provided for each example if required.)</i></p>
<p>Probate Practice Rights Outcome</p>	<p>Evidence Guidance: To meet this Outcome you will need to show that you can manage a client’s objectives/expectations. Within your logbook sheet you should explain what your client’s expectations were and explain how you managed those expectations. For example, perhaps you have had a client who had expectations regarding timescale or the outcome of a matter.</p> <p>You should attach evidence of how you managed the client’s objectives/expectations (e.g. an attendance note or an email conversation or a letter to a client). Examples of the types of evidence you can provide, which could also meet the Practice Rights Learning Outcome are listed below.</p>
<p>SE3 – Drafting LO2: Wills Draft and complete wills and ancillary documents</p>	<p>You should include evidence of managing the client’s expectations in respect of the preparation/amending of documents relating to their wills. As evidence you should include the following (but not limited to):</p> <ul style="list-style-type: none"> - Covering letters to the clients.
<p>SE4 – Managing Probate Activities LO1: Demonstrate an ability to plan and manage probate activities effectively</p>	<p>Include evidence of the following activities:</p> <ul style="list-style-type: none"> - Actively manage case files to meet expectations of clients and beneficiaries whenever possible including the timely provision of interim payments (if required).