

WBL Logbook Sheet Template

Competency e.g. 1	Learning Outcome e.g. 1.1	Example Number
6	6.3	1
Evidence provided e.g. letter to client dated 01.01.2017, Telephone attendance note dated 01.01.2017		
Email from probate solicitor dated 09/06/2021, email from probate solicitor dated 25/06/2021, letter to client dated 22/07/2021, telephone attendance note with client dated 23/07/2021, letter from client dated 24/07/2021, letter to client dated 09/08/2021, telephone attendance note with client dated 09/08/2021, letter to client dated 27/08/2021, letter from client dated 30/08/2021 and email link for Diversity Survey 2021 dated 05/07/2021		
Explain how the example meets the learning Outcome and how the evidence shows this		
<p><u>Demonstrate up to date knowledge of current equality legislation:</u></p> <p>The Equality Act 2010 is the current legislation in place that protects people in employment and when using private and public services. This legislation replaced previous laws, making the law easier to understand. Under this act people are protected against discrimination, harassment and victimisation and this is based on nine protected characteristics identified by the act being age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. It is therefore against the law in most cases to provide unfair treatment to someone on the basis of any of these personal characteristics.</p> <p>Working in a solicitor's firm in the conveyancing sector means that there may be many occasions when we are faced with a person who fits into one of these protected characteristics. For example, if it transpires that client falls under the disability characteristic, reasonable adjustments would need to be made for them so that they are not a disadvantage e.g. a partially sighted person may need letters and emails to be in a bigger font, a person who is partially deaf may need to meet in person rather than a phone call.</p> <p>Awareness of equality and diversity is important throughout all of the protected characteristics and it is therefore essential to ensure that when undertaking day to day tasks that someone who may be disadvantaged receives the same equal opportunity as someone who wouldn't fall into one of these characteristics.</p> <p><u>Evidence from my work that demonstrates avoiding discrimination and promoting equality:</u></p> <p>All clients need to be considered when assessing whether they fall into one of the protected characteristics.</p>		

The example I have provided here is where I was instructed by the probate solicitor in my firm to act for an elderly lady in connection with a probate sale for a longstanding client of the firm. I was also informed that she didn't have access to emails and that she confused on the whole conveyancing process.

Due to my understanding of the need to avoid discrimination and promote equality, I realised that as it was clear that she was a vulnerable client in view of her age and circumstances, I needed to ensure that she would not be at a disadvantage and would be treated fairly. In order to do so, I therefore needed to readjust my working style to suit her needs. One way that I did this was by writing in the post to her using clear understandable language and I also followed this up with telephone calls.

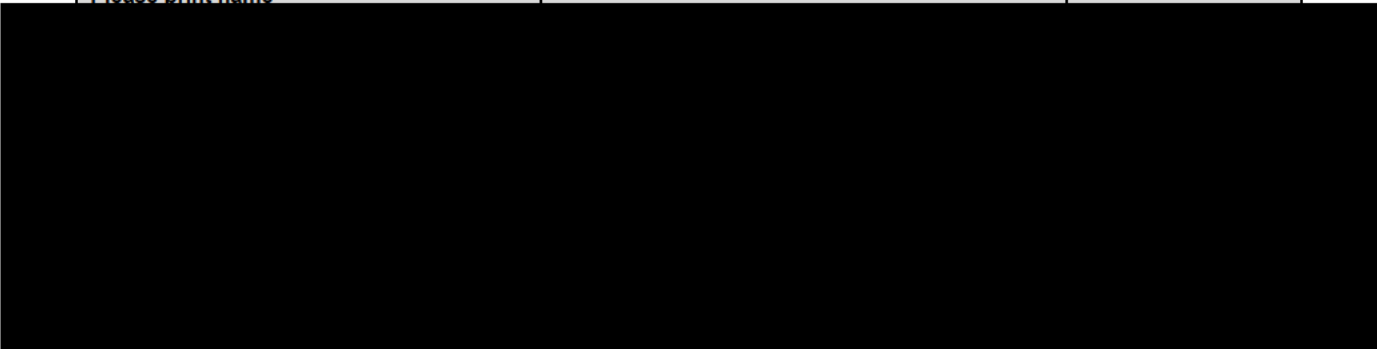
Additionally, I recently completed a Diversity Survey through my firm which everyone in the firm had to complete. I understand this information was sent off to the SRA in order to compile a report on diversity within the legal profession and additionally, this was used to help my firm to monitor the diversity in my workplace to ensure that regulatory requirements are being met and to strengthen our reputation.

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.

As we deal with clients on a daily basis, it is imperative to identify at an early stage whether a client would be identified as falling into one of the protected characteristics identified by the Equity Act 2010 to ensure that necessary preventions are put into place to prevent discrimination. It is important to ensure that everyone is treated equally, even if reasonable adjustments need to be made in the way that we work or deal with matters, to ensure that everyone has the same opportunities.

Date work completed: (i.e. evidence date)	30/08/2021	
Applicant's Name <small>Please print name</small>	Applicant's signature <small>I confirm that the work within the evidence is my own</small>	Date



[REDACTED]

From: [REDACTED]
Sent: 09 June 2021 14:18
To: [REDACTED]
Subject: FW: [REDACTED]
Attachments: Sales Letter V Sols.pdf; Sales Memo Sols.pdf; Brochure.pdf

Follow Up Flag: Follow up
Flag Status: Completed

[REDACTED] [REDACTED]

Please find attached details of a Probate sale. This is in the case of [REDACTED] who was a longstanding client of the firm and who died earlier this year.

We are in the process of making the Probate application in that we have submitted the paperwork to HM Revenue & Customs and we need to wait about four weeks before we are able to submit the documentation to the Probate Registry.

The executor is [REDACTED] who is obviously our client. She is quite elderly and does not have email but is happy to correspond by post or by telephone. [REDACTED] was her sister. All contact details should be on ALB.

Many thanks

[REDACTED]

From: [REDACTED]
Sent: 09 June 2021 10:45
To: [REDACTED]
Subject: [REDACTED]

Dear [REDACTED]

I do hope that this email finds you well.

Please find attached a copy of the Memorandum of Sale with covering letter and a copy of the sales particulars for the above named property.

If you have any queries, please do not hesitate to contact us.

Kind regards

[REDACTED]

[REDACTED]

██████████

From: ██████████
Sent: 25 June 2021 10:23
To: ██████████
Subject: RE: ██████████

Hi ██████████

Yes, what happens to the sale proceeds will depend on the instructions we have had in connection with the probate in the first place. So on this ██████████ case ██████████ has instructed us to deal with the administration of the estate so that includes collecting in all the funds including the house sale proceeds and distributing the balances. She is little bit confused herself I think by the whole process so it's best to refer any queries regarding this matter to me so we make sure we minimise the risk of any confusion!

You are right though in some cases we have simply been instructed on the probate side to get the grant of probate and do nothing further so the executors distribute. So the best answer is to check with either me or ██████████ or whoever has dealt with the probate first to make sure we deal with it in the right way.

I hope that makes sense!

██████████

22 July 2021

Date
Our reference
Your reference
Telephone
Fax
Email

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]

Dear [Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Re: Your Sale of [Redacted]

Thank you for your letter dated 19th July and I hope you had a lovely time at Silverstone!

[Redacted]
[Redacted]
[Redacted]
[Redacted]

In connection with the two sheds that were built 40 or 50 years ago, consent in writing would have been required from the original vendor or the owners of the estate prior to the erection of both of the sheds, as noted in the covenant referred to at point one of the Second Schedule, a further copy of which I attach for ease of reference. Therefore, I would be grateful if you could please confirm whether you are aware of any such consent being obtained and if so, please do send a copy of this consent to me so that I can supply it to the buyer's solicitor.

[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]
[Redacted]

I am afraid that if no consent was obtained, this would mean that this covenant has been breached and therefore the buyer's solicitor will require Indemnity Insurance to cover the seller in respect of this breach, in the event that a third party who holds the benefit of this restrictive covenant attempts to enforce it in the future and makes a claim for the breach.

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

I enclose a copy of an Indemnity Insurance Quotation, in the event that consent was not obtained. I would be grateful if you could please confirm whether you are agreeable to this policy being provided to the buyer on completion and whether the cost of the premium in the sum of [Redacted] can be deducted from the net sale proceeds on completion in order to pay for the policy? I would also be grateful if you could please confirm, to the best of your knowledge, whether

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Please note that although our offices are open to a limited extent, the majority of our staff remain working from home in accordance with Government advice. Those who do, maintain full access to our systems including telephones, so you can ring as normal however, this may mean that, when speaking to someone you can hear a child or animal in the background! The connection may also not be as good due to home internet connections, so it is however generally best to email.



Please also note that you should not attend either of our offices without an appointment and even if you have an appointment upon arrival at our offices you will have to have your temperature taken and if your temperature is too high then you will not be allowed in further and you will have to leave. This applies even if an appointment has been arranged.



We ask that, where possible, all correspondence is emailed to the person dealing with the transaction. Original signed documents, such as wills, contracts, deeds, leases etc. will still need to be sent to us in the post however. Hand deliveries, post and DX is uploaded to anyone working remotely as necessary.

We hope that you appreciate these measures and thank you for your cooperation

the points set out on the “required information” page attached to the front of the quotation, are correct as far as you are aware?

Although I look forward to hearing from you on the above point, the buyer’s solicitor has raised a few more enquiries and I would therefore be grateful if you could please possibly assist me on the following:-

1. The surveyor has asked the sellers to obtain confirmation as to whether any alterations to the internal plumbing have been made by an unqualified contractor. I cannot see a mention to alterations to the internal plumbing in the documentation you have provided, so this may just be a general question. However, I would be grateful if you could please confirm, as far as you are aware, whether any alterations have been made to the internal plumbing and whether this work was done by an unqualified contractor/plumber?
2. I note that the property was partially rewired in 2016. However, the buyer’s solicitor would like to know when the last electrical inspection took place. There is no requirement for a property owner to have the electrics regularly inspected and therefore it might be that the last inspection was at the time that the electrics were rewired. Are you aware whether there has been any electrical inspections since the rewiring? If so, please confirm when this took place and kindly provide documentary evidence to support this (if available).
3. I would be grateful if you could please provide me with a copy of the latest water bill for the property.

I appreciate that as this is an probate sale you may have very limited knowledge of the property and therefore, you will only be able to supply the information that you have. Therefore, if there are questions that you are unable to answer, this is not a problem as the buyer will need to take a view on the position.

If you have any questions at all, please do not hesitate to call me.

I look forward to hearing from you.

Yours sincerely,

████████████████████

TELEPHONE ATTENDANCE NOTE

Date: 23rd July 2021

Time: 14:48

Between [REDACTED]

[REDACTED] called and spoke with [REDACTED]

[REDACTED] advised that she had received [REDACTED] letter but was slightly confused so wanted to some clarification.

[REDACTED] went through each of the enquiries in detail with [REDACTED], along with the contents of her letter.

[REDACTED] confirmed that she understood and thanked [REDACTED] for clarifying. [REDACTED] then advised that as she has never lived at the property and the person who did live there had passed away, she has no idea whether the internal plumbing was altered and whether this was by someone qualified. However, she knows that the person who did live there wouldn't have just used anyone off the street, but she couldn't confirm the exact position. [REDACTED] advised that she totally understood and that as this is an executor sale, we appreciate that she may have very limited information so this was not a problem. [REDACTED] advised that she just needed to make her aware of the outstanding points and was just enquiring to see if she did have the required information. [REDACTED] advised at the end of the day its not a problem, if she doesn't know she doesn't know and therefore the buyer will just need to take a view on the position.

[REDACTED] advised that in relation to the water bill, she believes that she gave his to [REDACTED] for the probate application, but she cannot remember and did not keep a copy. [REDACTED] advised that she would check with [REDACTED] directly to see if he was this to hand and if not, we will just let the other side know that we do not have this so it cannot be provided.

[REDACTED] thanked [REDACTED] for all her help and advised that she will put her answers in writing and send us a letter in the post. [REDACTED] thanked her for this and advised that if she ever has any questions, she was more than welcome to give [REDACTED] a call so that she could assist in any way that she could. [REDACTED] thanked [REDACTED] for this.

[REDACTED] advised [REDACTED] that she will be on annual leave next week, but would pick up where she left off as soon as she was back in the office.

[REDACTED] said that she understood the position and wished [REDACTED] a lovely holiday.

26 JUL 2021

24.7.21.

Dear [REDACTED]

Re Sale [REDACTED]

I have never lived at [REDACTED], and know virtually nothing about it except as a visitor to my parents and sister, but I will do my best to answer the questions.

To the best of my knowledge, the last time the electric wiring was checked was in 2016. I doubt [REDACTED] would have thought it needed to be repeated in the comparatively short time since then.

Any plumbing alteration? Again no idea, but what I am sure of is that she would never have used unqualified tradesmen for any sort of work.

The sheds. Previously I was unaware of a covenant, but I can find no evidence of permission being asked or granted for wooden sheds in the garden. I am happy to pay, from the estate, for a one off premium of Indemnity Insurance at [REDACTED] as quoted, to satisfy all parties concerned.

The latest water bill I could find doesn't have much information on it, but I am enclosing it anyway. I apologise for my notes and scribbles on it, which I did at the time when ringing them about the credit owing - which was returned to the a/c in March I believe. I am also enclosing the previous one of May 2020 which does give more information. [REDACTED] seems to have had them only once a year. She paid regularly by direct debit.

Lastly the "Required Information". I would agree that all three can be answered as "true", as far as I am aware.

I really hope this will adequately answer all the queries and that no more will be required!

Grateful thanks for all your help, on the phone as well. x

Sincerely,
[REDACTED]

9th August 2021

Date
Our reference
Your reference
Telephone
Fax
Email

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]

Dear [Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Re: Your Sale of [Redacted]

Thank you for your letter dated 24th July, received 26th July.

[Redacted]
[Redacted]
[Redacted]
[Redacted]

I can confirm that I have gone back to the buyer's solicitor with replies to their remaining enquiries and I now await hearing from them with an approved Contract and draft Transfer for approval.

[Redacted]
[Redacted]
[Redacted]

Once these documents are in my possession, the same will be sent to you for signing.

[Redacted]
[Redacted]
[Redacted]

I will be in contact again shortly.

[Redacted]
[Redacted]
[Redacted]

Yours sincerely,

[Redacted]
[Redacted]
[Redacted]

[Redacted]

[Redacted]
[Redacted]
[Redacted]

[Redacted]
[Redacted]
[Redacted]

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TELEPHONE ATTENDANCE NOTE

Date: 9th August 2021

Time: 14:15

Between: [REDACTED] [REDACTED]
[REDACTED]

[REDACTED] called [REDACTED] and asked how she was.

[REDACTED] then advised that she had safely received her letter with her replies to enquiries and thanked [REDACTED] for sending this through. [REDACTED] advised that she was sending a letter to her in the post to confirm safe receipt and informed her that all the replies to enquiries had now been dealt with.

[REDACTED] that she was just awaiting the approved documentation and will then send this for her for signing.

[REDACTED] advised that the probate was still being processed and as soon as this was finalised, [REDACTED] would send the Grant of Probate to the buyer's solicitor as evidence that she had been appointed the executor.

[REDACTED] thanked [REDACTED] for the call and the update and look forward to hearing from her with the documentation in due course.

27th August 2021

Date
Our reference
Your reference
Telephone
Fax
Email

[Redacted]

[Redacted]

[Redacted]

Dear [Redacted]

[Redacted]

Re: Your Sale of [Redacted]

Thank you for your letter dated 20th August confirming the price reduction.

[Redacted]

I am pleased to confirm that I have now received an approved form of Contract and the draft Transfer Deed that I have prepared has also been approved by the buyer's solicitor.

[Redacted]

Therefore, please find enclosed the approved Contract for your signature and return. The Contract for Sale incorporates the Standard Conditions of Sale. These conditions are incorporated into virtually every Contract for the sale of residential properties in England and Wales. They are detailed but are designed to strike a fair balance between the interest of the seller and buyer. Once signed and exchanged, the Contract will bind you to sell the property. You should sign where indicated (and initial any amendments also where indicated). Please leave the agreement undated. The rate of interest specified is the interest that you would have to pay to the buyer should completion not take place on the agreed date through your fault – this is a standard clause and very seldom causes difficulty.

[Redacted]

I am also pleased to enclose the Transfer Document for you to sign. This is the document under which the property will be transferred to the buyer on completion but will not operate until completion day and will be held on my file in readiness. This should be signed by you where indicated in the presence of

[Redacted]

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an **independent** witness who will need to add his or her signature, name and address where shown.

Please then return both original signed documents to me in the post undated to be held on the file in readiness.

I have been informed that probate is likely to be completed shortly (hopefully within the next week or so) and therefore once this comes through and I am in receipt of the enclosed signed documents from you, we will be in a position to exchange Contracts. I will of course contact you at that stage to request your preferred dates for completion.

I look forward to hearing from you.

Yours sincerely,

████████████████████

30/8/21

1 AUG 2021

Dear [REDACTED]

re. Sale [REDACTED]

Thank you for your letter and the enclosed Contract and Transfer. I am returning these documents duly signed where indicated, and witnessed, ready for the "green light" for you to proceed with the next step.

Thank you once again for your help, I don't understand much of the small print (!) and rely on you and [REDACTED] to guide me with all these legal details. Couldn't do it without you both.

Thank you,

Yours sincerely,

[REDACTED]

[REDACTED]

From: [REDACTED]
Sent: 05 July 2021 10:47
To: [REDACTED]
Subject: Diversity Survey 2021

Importance: High

Follow Up Flag: Follow up
Flag Status: Completed

Dear All

Yes it's that time again!

The SRA is again collecting diversity data on the legal profession.

This means that all employees in a firm are being asked to complete a short online survey providing diversity information about themselves. This will only take a few minutes to complete and your responses will be completely **anonymous**. We are using the Riliance system which is endorsed by The Law Society, to collect and collate Data.

Your contribution will help us to monitor the diversity of our workforce, this will help us with winning business by evidencing our performance on diversity, strengthen our reputation as well as helping us to meet our regulatory requirements.

The SRA will use this information to compile a report on diversity within the legal profession and will also provide individual firms with a diversity breakdown of their employees. No personal information is collected and only aggregated data (totals) will be made available to us. Although this survey is voluntary I encourage you to participate as a large response will help encourage a strong, independent, diverse and effective legal profession.

[REDACTED]

I suggest you copy the link into your browser if you can't just click it to open the survey.

Please let me know if you have any difficulty in accessing the survey.

As it's anonymous and voluntary please don't tell me if you've completed it or not!

Thanks

[REDACTED]