



**Australian Government**

# **Assessment Requirements for AHCAGB602 Manage estate planning**

**Release: 1**

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## Modification History

Release	TP Version	Comment
1	AHCv1.0	Initial release

## Performance Evidence

The candidate must be assessed on their ability to integrate and apply the performance requirements of this unit in a workplace setting. Performance must be demonstrated consistently over time and in a suitable range of contexts.

The candidate must provide evidence that they can:

- identify estate planning requirements
- clarify estate planning arrangements
- implement estate planning
- separate personal goals from enterprise goals
- clarify and mediate apparent inequities in estate distribution with relevant parties where necessary
- define agreements and contracts
- consider investment, financial and retirement options.

## Knowledge Evidence

The candidate must demonstrate knowledge of:

- effective interpersonal communication techniques
- conflict resolution, negotiation and mediation techniques
- solve problems relating to estate management
- goal setting strategies
- working knowledge of estate structures, retirement options, wills and estate planning procedures.

## Assessment Conditions

Competency is to be assessed in the workplace or simulated environment that accurately reflects performance in a real workplace setting.

Assessors must satisfy current standards for RTOs.

## Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.education.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72>