



Australian Government

**Assessment Requirements for BSBLEG515
Apply legal principles in wills and probate
matters**

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- determine and obtain information required to handle will and probate matters
- prepare appropriate documentation, including wills, probate and other deceased estate documentation
- conduct all work according to legislative and organisational requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline the scope of the job role in the context of legislation, regulations and codes of practice
- summarise the organisation's policies and procedures for wills and probate matters
- outline the roles and responsibilities of parties involved in wills and probate matters
- briefly outline the forms, documents and annexures relevant to wills and probate.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- appropriate legislation and regulations relevant to wills and probate matters
- workplace policies and procedures and reference materials.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>