



**Australian Government**

# **BSBLEG515 Apply legal principles in wills and probate matters**

**Release: 1**

## BSBLEG515 Apply legal principles in wills and probate matters

### Modification History

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

### Application

This unit describes the skills and knowledge required to prepare wills and probates, powers of attorney and other deceased estate documentation.

It applies to individuals who work under supervision, use legal principles and evaluate information from a variety of sources to provide support in a range of legal service settings.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

### Unit Sector

Administration – Legal Services Administration

### Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Identify laws and principles of wills and probate law	1.1 Source legislation, regulations and policies relevant to wills, probate and administration 1.2 Interpret key principles as they apply to wills, probate and administration matters
2. Enhance professional practice through application of relevant principles of wills and probate law	2.1 Establish relevant information in context of the particular matter 2.2 Ensure client's needs are met, obtain testamentary, solicitor, deceased estate instructions and other details

<b>ELEMENT</b>	<b>PERFORMANCE CRITERIA</b>
3. Prepare and execute documentation	<p>3.1 Draft documentation according to instructions of designated individual</p> <p>3.2 Forward documentation to designated individual for review and sign off in accordance with organisation's policies and procedures</p>
4. Process documentation	<p>4.1 Ensure documents are despatched to appropriate agencies according to instructions</p> <p>4.2 Determine types of costs in accordance with legislative and regulatory requirements for costing legal services</p> <p>4.3 Facilitate liaison and communication with the parties</p> <p>4.4 Maintain files, noting critical dates and reminders</p>

## Foundation Skills

*This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.*

<b>Skill</b>	<b>Performance Criteria</b>	<b>Description</b>
Reading	1.1, 1.2, 2.1, 3.2, 4.1, 4.2, 4.4	<ul style="list-style-type: none"> <li>Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information</li> </ul>
Writing	2.1, 2.2, 3.1, 4.4	<ul style="list-style-type: none"> <li>Uses clear, accurate and relevant language to organise and record information and complete documentation</li> </ul>
Oral Communication	2.1, 2.2, 4.3	<ul style="list-style-type: none"> <li>Participates effectively in spoken interactions using appropriate language and features for each audience and situation</li> <li>Uses active listening and questioning techniques to confirm and clarify understanding</li> </ul>
Numeracy	4.2	<ul style="list-style-type: none"> <li>Uses straightforward mathematical calculations to determine costs</li> </ul>
Navigate the world of work	1.1, 1.2, 2.2, 3.2, 4.1, 4.2	<ul style="list-style-type: none"> <li>Adheres to organisational policies and procedures</li> <li>Keeps up-to-date with relevant legislation, regulations and policies and considers implications of these when planning and undertaking work</li> </ul>
Interact with others	2.1, 2.2, 3.2, 4.3	<ul style="list-style-type: none"> <li>Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role</li> </ul>

Get the work done	1.1, 1.2, 2.1, 2.2, 4.1, 4.4	<ul style="list-style-type: none"> <li>Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructions</li> <li>Evaluates information to decide on relevance to situation</li> </ul>
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## Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG515 Apply legal principles in wills and probate matters	BSBLEG515A Apply legal principles in wills and probate matters	Updated to meet Standards for Training Packages	Equivalent unit

## Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>