



Australian Government

BSBLEG530 Apply legal principles in wills and probate matters

Release: 1

BSBLEG530 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 7.0.

Application

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

The unit 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

Technical Skills – Legal Services

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. Prepare to apply principles in wills and probate matters	1.1 Identify task requirements 1.2 Identify key wills and probate elements for analysis according to task and organisational requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements
2. Apply principles in wills and probate matters	2.1 Analyse legal matter relevant to corporation law according to task requirements 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational requirements

ELEMENT	PERFORMANCE CRITERIA
3. Finalise application of principles in wills and probate matters	3.1 Verify and review documentation with relevant organisational personnel 3.2 Amend and sign-off according to organisational policies and procedures 3.3 Store or despatch document according to task and organisational requirements

Foundation Skills

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

Skill	Description
Reading	Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	Uses clear, accurate and relevant language to organise and record information and complete documentation
Oral Communication	- Participates effectively in spoken interactions using appropriate language and features for each audience and situation - Uses active listening and questioning techniques to confirm and clarify understanding
Initiative and enterprise	- Adheres to organisational policies and procedures - Keeps up-to-date with relevant legislation, regulations and policies and considers implications of these when planning and undertaking work
Teamwork	Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Planning and organising	- Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructions - Evaluates information to decide on relevance to situation

Unit Mapping Information

Supersedes and is equivalent to BSBLEG515 Apply legal principles in wills and probate matters.

Links

Companion Volume Implementation Guide is found on VETNet -

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