



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

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

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.2, 4.1, 4.2, 4.4	Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	2.1, 2.2, 3.1, 4.4	Uses clear, accurate and relevant language to organise and record information and complete documentation
Oral Communication	2.1, 2.2, 4.3	- 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
Numeracy	4.2	Uses straightforward mathematical calculations to determine costs
Navigate the world of work	1.1, 1.2, 2.2, 3.2, 4.1, 4.2	- 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
Interact with others	2.1, 2.2, 3.2, 4.3	Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role

Get the work done	1.1, 1.2, 2.1, 2.2, 4.1, 4.4	- Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructions - Evaluates information to decide on relevance to situation
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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>

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

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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

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