



Australian Government

Assessment Requirements for BSBLEG530 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 7.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in wills and probate matters on at least four occasions.

In the course of the above, the candidate must:

- prepare to apply wills and probate principles according to task requirements
- apply elements of wills and probate principles to prepare a deliverable
- review and amend deliverable according to feedback from supervisor
- despatch deliverable according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of the job role in the context of legislation, regulations and codes of practice
- summarise the policies and procedures of the organisation for wills and probate matters
- contents and process to prepare documents required for task
- sources of instructions including testamentary, solicitor and deceased estate
- roles and responsibilities of parties involved in wills and probate matters
- forms, documents and annexures relevant to wills and probate.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to wills and probate matters

- workplace policies and procedures and reference materials relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

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